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Lesson Three: Requirements

Lesson Goal

At the end of this lesson you will be familiar with the fundamental areas that *PRweb* supports in the creation, review, approval, and submission of requirements information to the Contracting Office. You will be able to effectively create a Purchase Request (PR) and associated attachments, route the PR for review and approval, submit a PR to the contracts facility and generate various reports provided by *PRweb*.

Learning Objectives

You will be able to:

- Define what a PR is and how its components work together.
- Create and manage line item information.
- Attach documents to a PR.
- Create a DD254 security classification form.
- Route and approve PRs and their related documents within *PRweb* and PD^2.
- Generate PR Status Reports and Standard Reports.

Lesson Time

This lesson requires three hours.

Topics

Topic	**Approach**
Topic 1: Purchase Request	Hands-on application of PR and line item creation.
Topic 2: **Attachments**	Hands-on application of adding, viewing and removing an attachment.
Topic 3: **DD254**	Instructor demonstration of the DD254 security form.
Topic 4: **Routing and Approval**	Hands-on application of creating route templates. Hands-on application of approving and routing a PR within *PRweb*. Hands-on application of routing from *PRweb* to PD^2, and from PD^2 back to *PRweb*.
Topic 5: **Reports**	Instructor demonstration of generating PR Status Reports and Standard Reports. Hands-on application of changing the Archive Days for your **Archive** folder.

Key Terms

Attachment	Supplemental information associated with a PR.
DD254	Security document attached to a PR describing the security classification that the item being requested requires.
Line Item	Specifications of what is being requested. Line Items list each individual item being requested and indicate the item's price, receiver location, POC information, etc.
PR	Purchase Request. A document used by the Department of Defense to allow a user to request all manner of durable goods from a centralized contracting and inventory control location.
Routing Sheet	Form that defines the order in which users receive PRs within *PRweb* and PD^2.
Standard Reports	Pre-formatted reports that provide business process information.
Status Reports	Reports that provide information on the status of PRs. Includes a snapshot of the Milestone Plan, Solicitation and Award for a PR.

Key Points

- *PRweb* assists you in the creation and electronic submission of PR forms.
- Funding can be assigned both at the contract level and at the line item level.
- The Standard Reports feature is very helpful for sorting through large amounts of information.
- The suggested attachment types for *PRweb* are any Microsoft Office documents (Word™, Excel™, and PowerPoint™).

1. Purchase Request

The PR is the principle document supported within *PRweb*. *PRweb* enables you, the requesting agent, to create, edit, route, approve, and submit a PR. The electronic interchange of the PR, as well as the ability of the Requesting Office to track the status of the PR, will provide an integrated solution to support paperless acquisition.

1.1 Hands-on Application: Creating a Purchase Request

1. Access the site-specific URL for *PRweb*.
2. Enter your username in **User Name** field.
3. Enter your password in the **Password** field.

Note: The password entered must be a minimum of eight characters including one or more special characters (e.g., "%" or "#").

4. Click the [**Login**] button.

   The *PRweb* user's desktop opens.

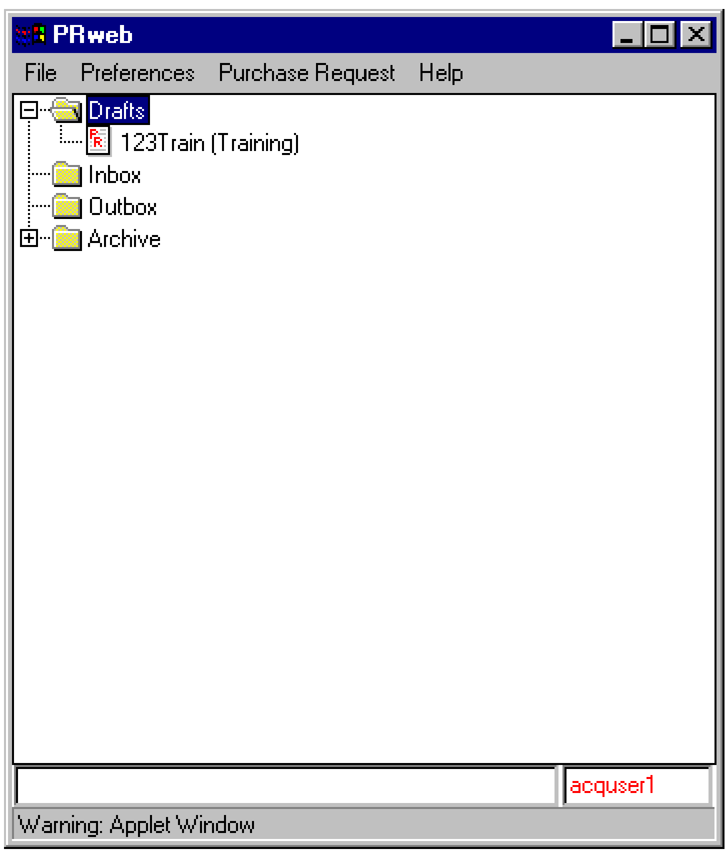

Figure 1: PRweb User's Desktop Window

5. From the menu, select **Purchase Request → New**.

The **Purchase Request - New** window opens.

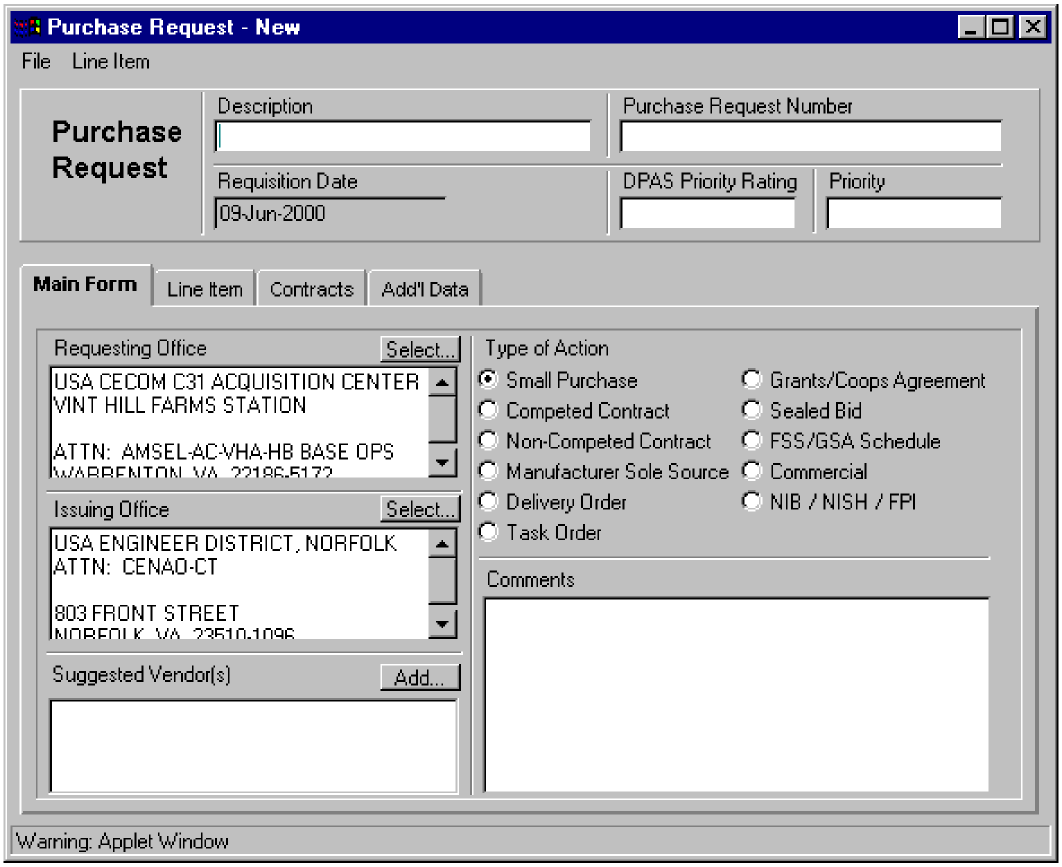

Figure 2: Purchase Request – New – Main Form Tab

The PR contains four tabs for ease of use and navigation: *Main Form*, *Line Item*, *Contracts*, and *Add'l Data*. Each tab provides the ability to input different Requirements information.

Note: The only required fields on the PR are the **Description** and **PR Number** fields.

Header information is visible at the top of the window and remains visible from every tab of the PR. The **Requisition Date** field defaults to today's date and is not editable.

1. Enter a description of the PR in the **Description** field.
2. Enter a number in the **Purchase Request Number** field.
3. Enter a Defense Priority Allocation System (DPAS) priority rating in the **DPAS Priority Rating** field.
4. Enter a priority in the **Priority** field.

1.2 Main Form Tab

The PR opens to the *Main Form* tab. The **Requesting Office** field defaults to the Requesting Office of the contact that was selected when you registered. The **Issuing Office** field defaults to the site-specific Issuing Office address that was selected by the System Administrator in Site Management.

1. Select the desired **Type of Action** radio button.

2. Enter any specific information that can be required for the Contracting Officer in the **Comments** field.

3. Click the [**Add**] button in the **Suggested Vendor(s)** field to search the database for a vendor.

   The **Vendor Address Search** window opens. The **Search Criteria** field defaults to the universal search symbol (**%**). The Vendor Search feature will display approved vendors in the PD^2 database. You can refine your search as required by using the **Search By** radio buttons.

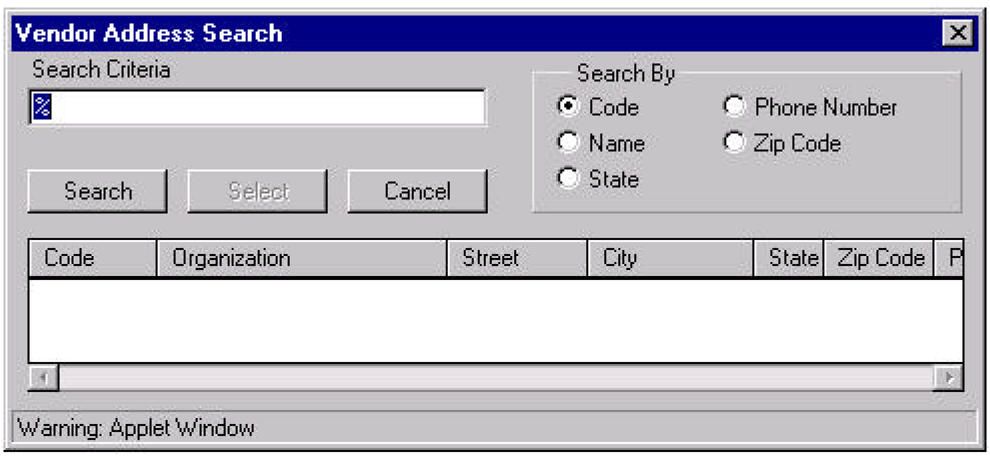

Figure 3: Vendor Address Search Window

4. After entering the search criteria, click the [**Search**] button.

5. Click the [**Search**] button.

6. Highlight the desired vendor, and click the [**Select**] button to select a suggested vendor.

Note: The [**Add**] button becomes the [**More**] button after selecting one **Suggested Vendor(s)**.

7. Click [**OK**] to close the summary.

8. Enter comments about the requirement into the **Comments** field.

Additional Suggested Vendors

1. Click the [**More**] button next to the **Suggested Venor(s)** field.

   The **Vendor Summ**ary View window opens.

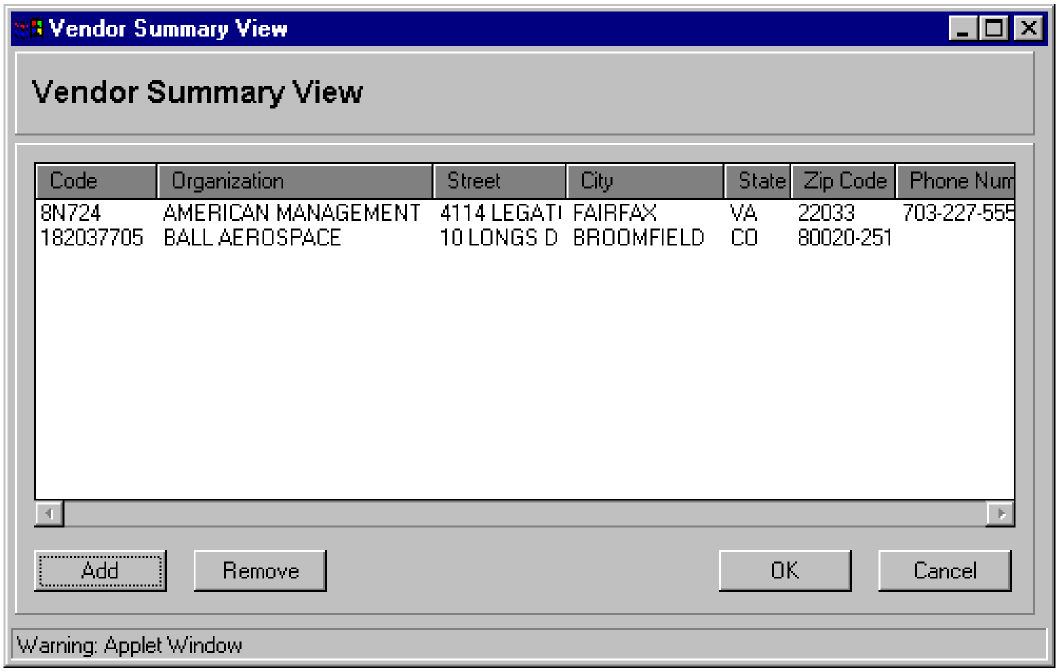

Figure 4: Vendor Summary View Window

2. Click the [**Add**] button.

   The **Vendor Address Search** window opens.

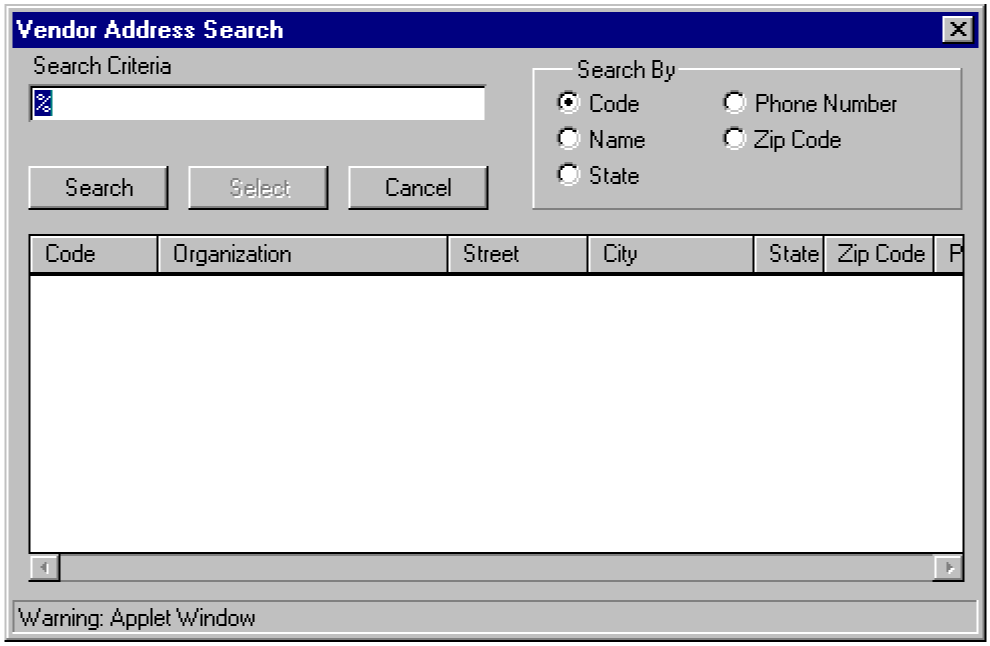

Figure 5: Vendor Address Search Window

3. After entering the search criteria, click the [**Search**] button.
4. Highlight the desired vendor address.
5. Click the [**Select**] button.

   The *Main Form* tab displays with the selected vendor(s) in the **Suggested Vendor(s)** field.

Delete a Suggested Vendor

1. Click the [**More**] button.

   The **Vendor Summary View** window opens.

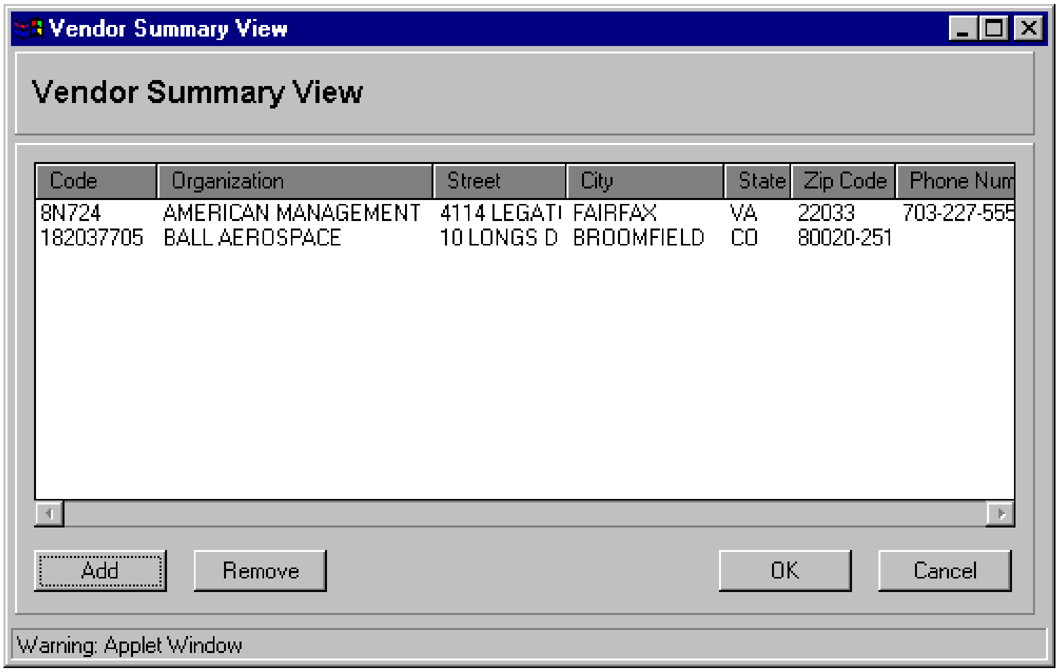

Figure 6: Vendor Summary View Window

1. Highlight a vendor and click on the [**Remove**] button.
2. Click [**OK**] to return to the *Main Form* tab.

1.3 Line Item Tab

The *Line Item* tab enables you to create Contract Line Item Numbers (CLINs) and SubCLINs, and assign Contract or Line Item level funding. *PRweb* provides the capability to assign Contract level or Line Item level funding for a CLIN.

Click the *Line Item* tab.

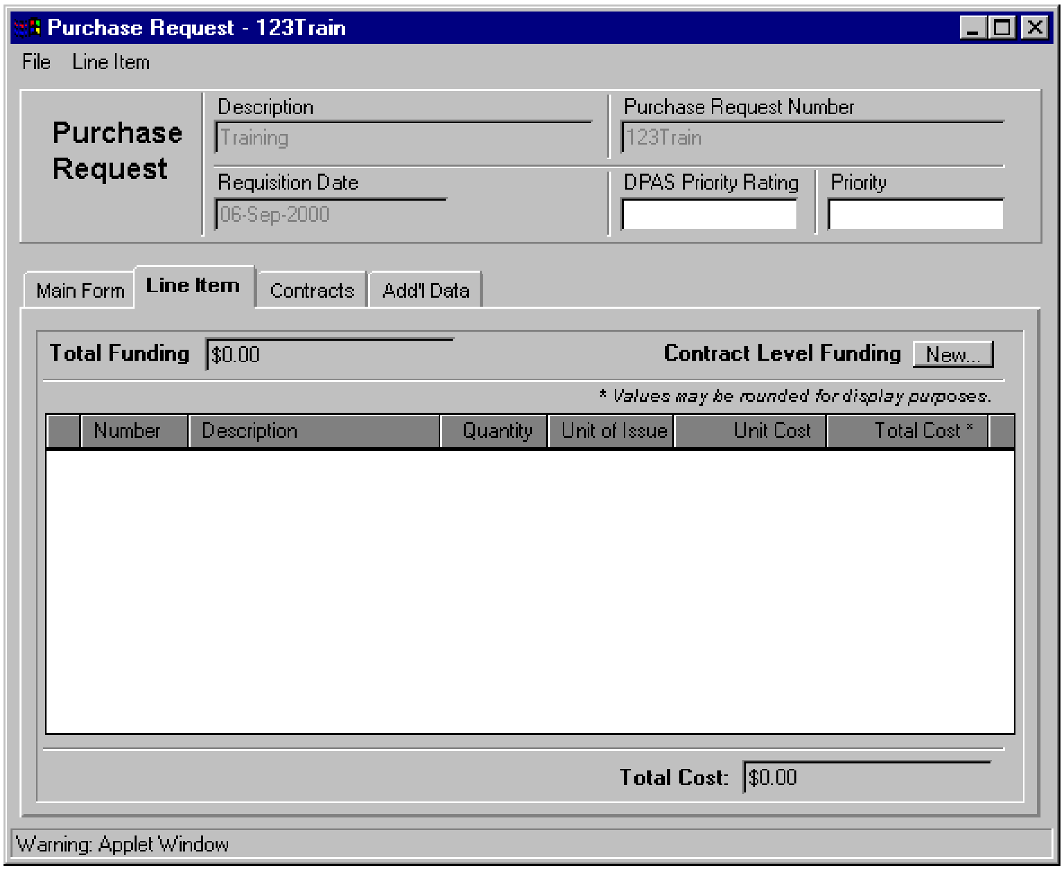

Figure 7: Purchase Request – New – Line Item Tab

1.3.1 Create a CLIN

From the menu, select **Line Item → New → CLIN** to create a CLIN.

The **Line Item Detail – New** window opens as shown on the next page.

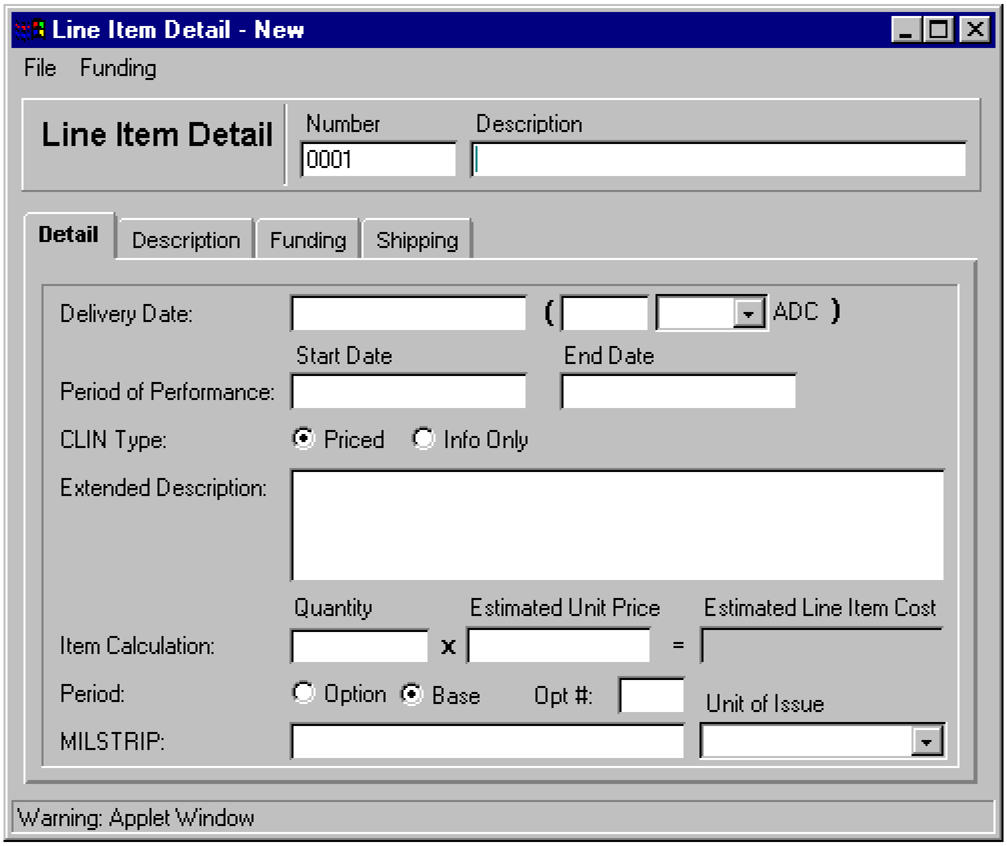

Figure 8: Line Item Detail – New-Detail Tab

The **Line Item Detail** window contains four tabs: *Detail*, *Description*, *Funding*, and *Shipping*. The *Detail* tab provides delivery information and item description, quantity and estimated cost. The *Description* tab provides additional information pertinent to the CLIN/ SubCLIN. The *Funding* tab provides CLIN level funding information. The *Shipping* tab provides specific shipping information for the CLIN/ SubCLIN.

1.3.1.1 Detail Tab

The *Detail* tab enables you to enter information pertaining to the CLIN.

Note: The **Number** field defaults to the next consecutive integer when starting new Line Items. Since this is the first Line Item for this PR, the number is "0001". This field is editable and is visible from every tab of the **Line Item Detail** window.

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1. Enter a description for the Line Item in the **Description** field.

Note: The **Description** field is visible and editable from every tab of the **Line Item Detail** window.

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2. Enter a date for delivery in the **Delivery Date** field.

Note: You can enter Period of Performance starting and ending dates in the **Period of Performance Start Date** and **Period of Performance End Date** fields. You must enter either a **Period of Performance**, **Delivery Date**, or **ADC** (After Date of Contract).

3. Enter a more detailed description of the Line Item in the **Extended Description** field.
4. Enter the number of items you are requesting to purchase in the **Quantity** field.
5. Enter an estimated price for each item in the **Estimated Unit Price** field.

Note: The value in the **Estimated Line Item Cost** field is calculated from the values entered in the **Quantity** and **Estimated Unit Price** fields.

6. Enter a MILSTRIP in the **MILSTRIP** field.
7. Select a unit of issue from the **Unit of Issue** drop-down list box.

Note: The **Units of Issue** selected in *Lesson 2, Topic 8* display.

1.3.1.2 Description Tab

The *Description* tab enables you to enter additional information pertaining to the CLIN. You can include information such as **Manufacturer, Drawing Number,** and **National Stock Number.**

1. Click the *Description* tab.

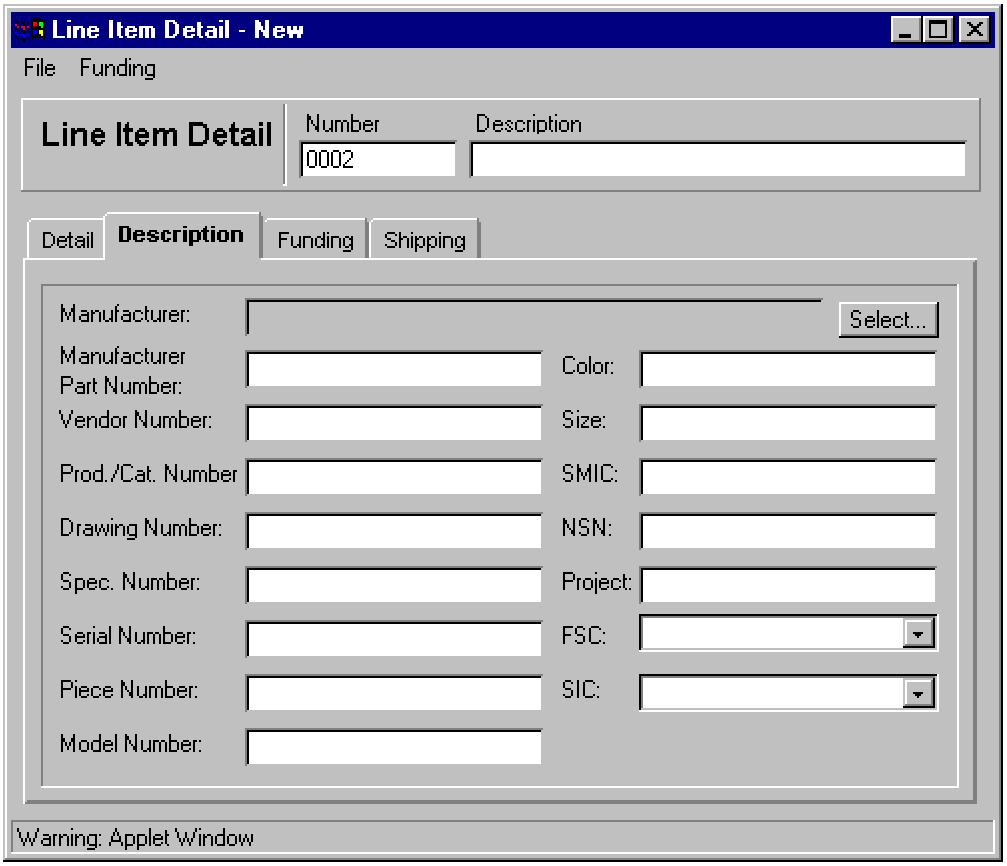

Figure 9: Line Item Detail – New – Description Tab

2. Click the [**Select**] button to the right of the **Manufacturer** field to select a manufacturer for the item.

   The **Vendor Address Search** will display all of the vendors from the PD^2 database.

3. Enter the pertinent information for the Line Item description in their respective fields.
4. Select a code from the **FSC** drop-down list box.
5. Select a code from the **SIC** drop-down list box.

Note: The **FSC** code and **SIC** code selected in *Lesson 2, Topic 8* display.

1.3.1.3 Funding Tab

The *Funding* tab enables you to add Line Item level funding and assign a Job Order. It can display all funding information for the given CLIN. In this exercise, you will add Line Item funding and a Job Order for the CLIN.

Click the *Funding* tab.

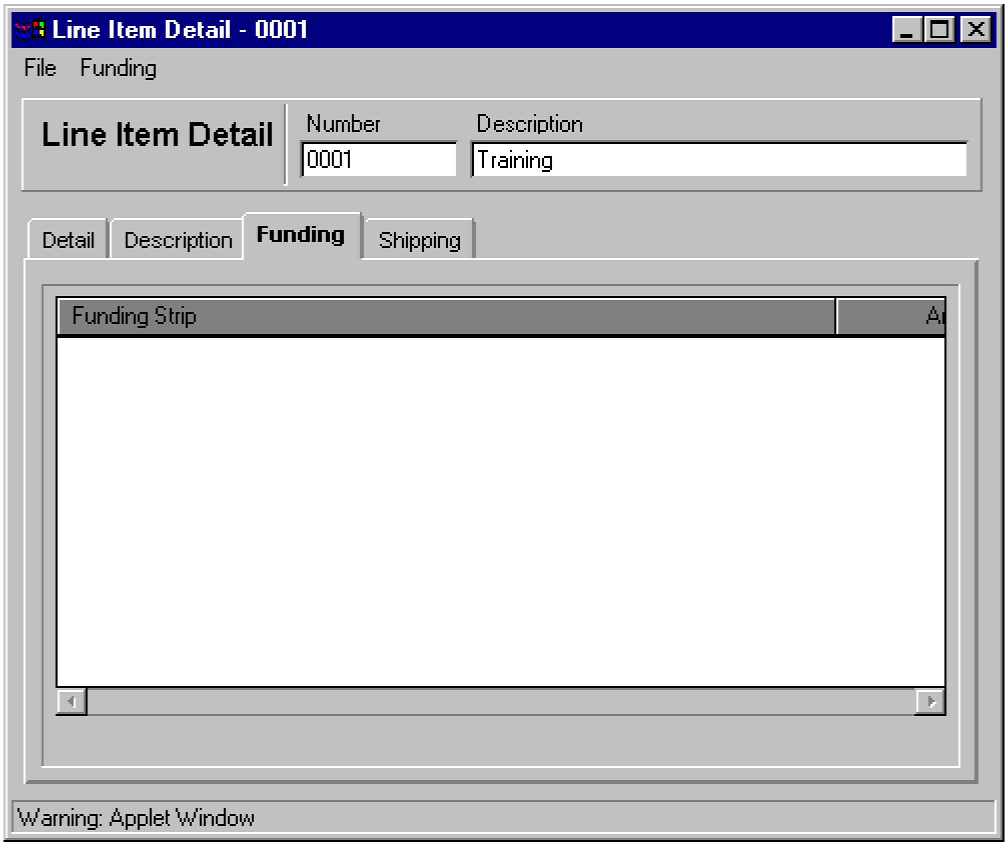

Figure 10: Line Item Detail – New – Funding Tab

1.3.1.3.1 Add Line Item Level Funding

1. From the menu, select **Funding → New** to open the **Funding Sources – New** window.

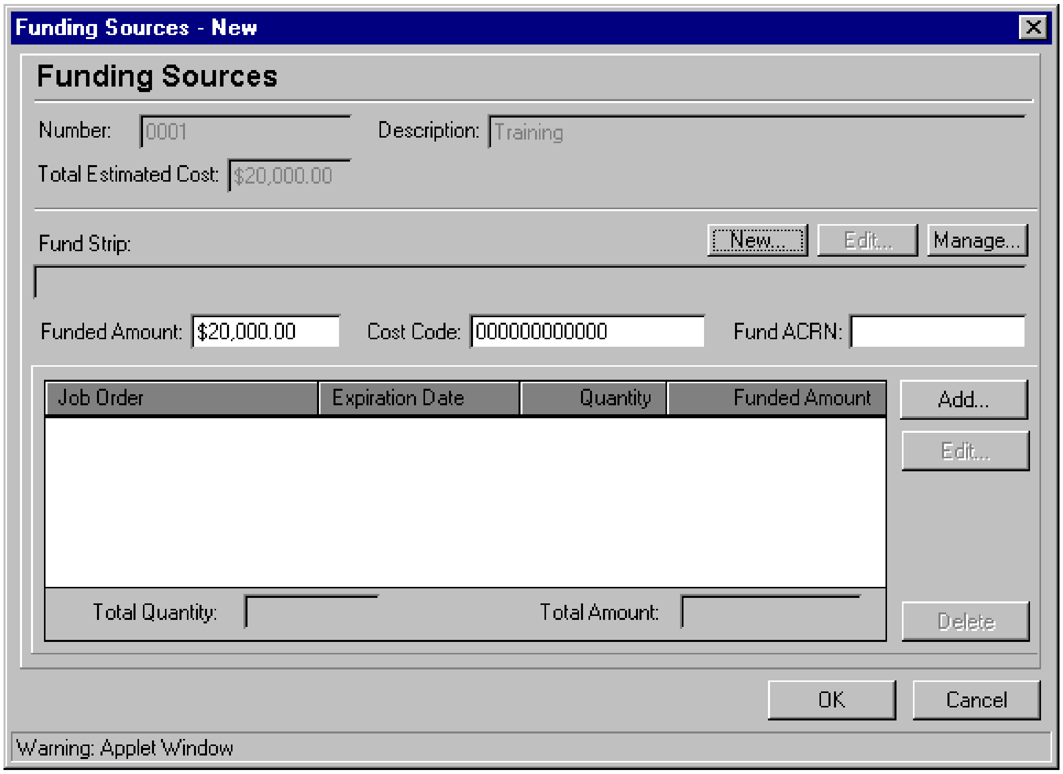

Figure 11: Funding Sources – New Window

2. Click the [**Manage**] button.

   The **Funding Strip Search** window opens.

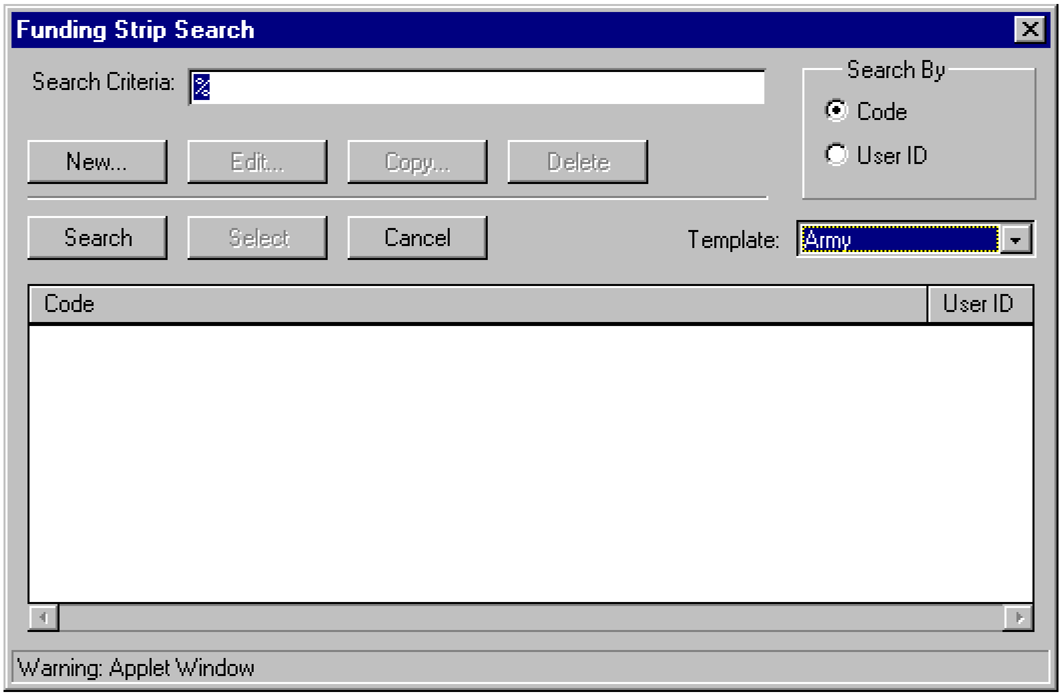

Figure 12: Funding Strip Search Window

3. Click the [**New**] button to create a new funding strip.

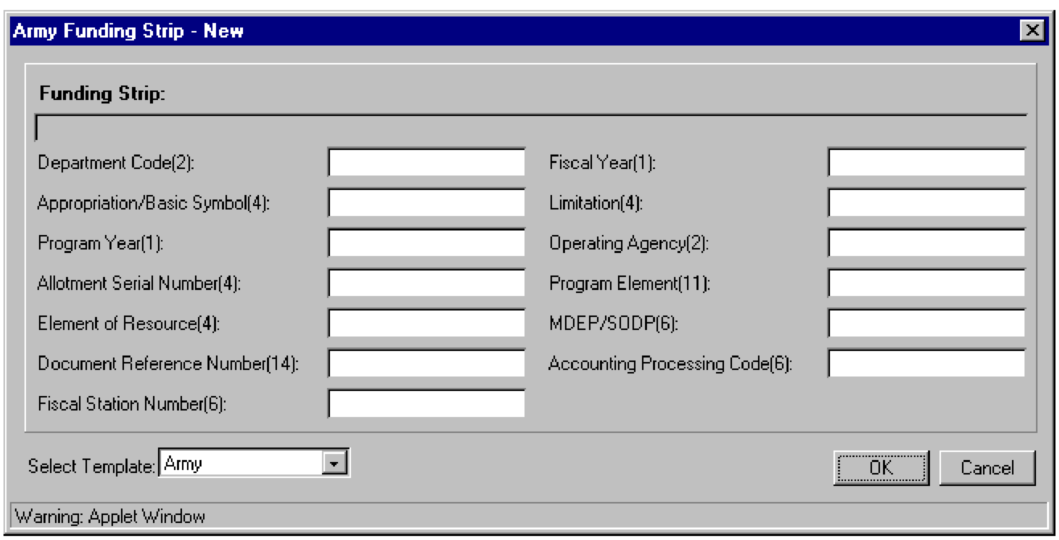

Figure 13: Army Funding Strip – New Window

4. Enter the appropriate funding strip information in the various fields of the **Funding Strip – New** window.
5. Click [**OK**] to return to the **Funding Strip Search** window.

   The new funding strip displays in the table on the **Funding Strip Search** window.

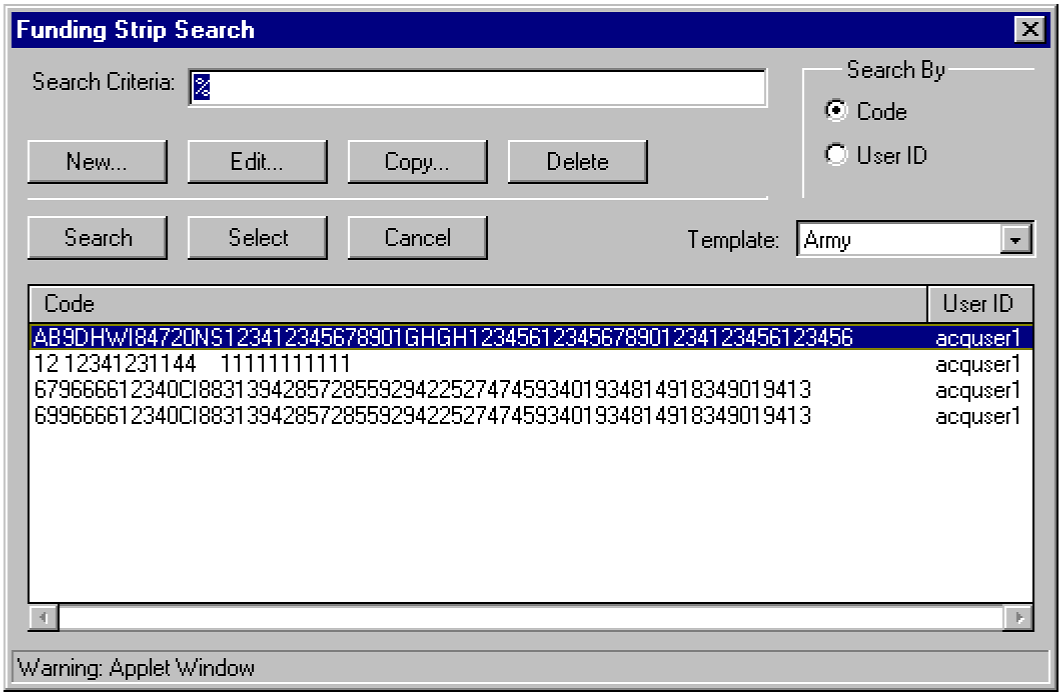

Figure 14: Funding Strip Search Window

Note: You can also copy, edit and delete existing funding strip information from this window by clicking the appropriate button.

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6. Highlight the new funding strip.
7. Click the [**Select**] button.

1.3.1.3.2 Hands-on Application: Create a Job Order

You can create a Job Order to assign to a CLIN.

1. Click the [**Add**] button to the right of the **Job Order** field.

   The **Attach Job Order – New** window opens.

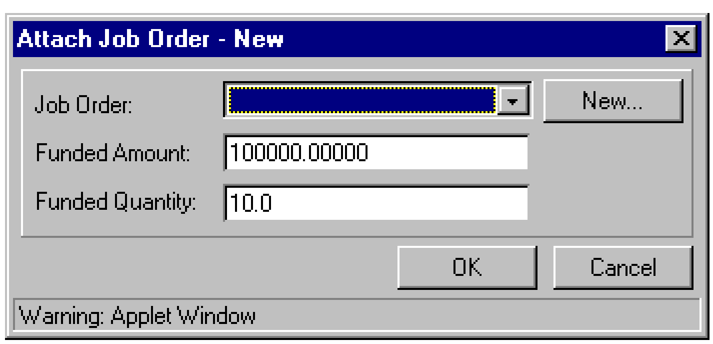

Figure 15: Attach Job Order – New Window

2. Click the [**New**] button.

   The **Create New Job Order** window opens.

Figure 16: Create New Job Order Window

3. Enter a job order number in the **Job Order Number** field.
4. Enter a Funds Expiration Date in the **Funds Expiration Date** field.

Note: Be sure to use the MM/DD/YYYY format for the date or use the pop-up calendar.

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5. Click [**OK**] to save the new Job Order.

   The **Create New Job Order** window closes and returns you to the **Attach Job Order – New** window.

6. Click [**OK**].

   The **Attach Job Order – New** window closes and returns you to the **Funding Sources – New** window. The Job Order Number and Funds Expiration Date display in their respective fields.

1.3.1.3.3 Hands-on Application: Assign a Job Order

You can also assign an existing Job Order to the CLIN if necessary.

1. Click the [**Add**] button to the right of the **Job Order** field on the **Funding Sources - New** window.

   The **Attach Job Order – New** window opens.

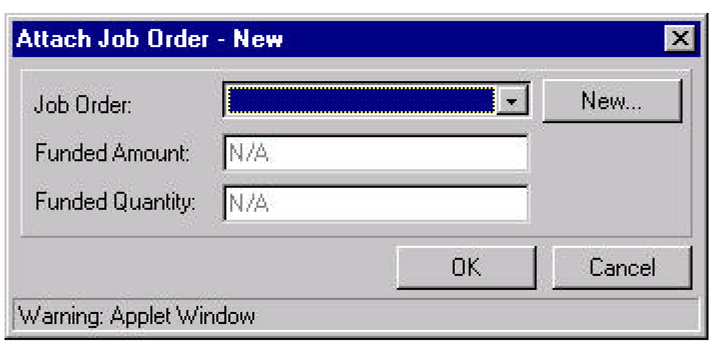

Figure 17: Attach Job Order – New Window

2. Click the [**New**] button to create a new Job Order.

Note: You can select an existing Job Order from the **Job Order** drop-down menu or create a new Job Order to apply to the CLIN.

Figure 18: Create New Job Order Window

3. Enter the desired **Job Order Number** and **Funds Expiration Date** in their respective fields.

Note: You must use the MM/DD/YYYY date format.

4. Click [**OK**] to save the new Job Order.

Note: You can edit or delete existing Job Order information by using the applicable buttons on the **Funding Sources** window.

1.3.1.4 Shipping Tab

The *Shipping* tab enables you to enter detailed shipping information for the CLIN.

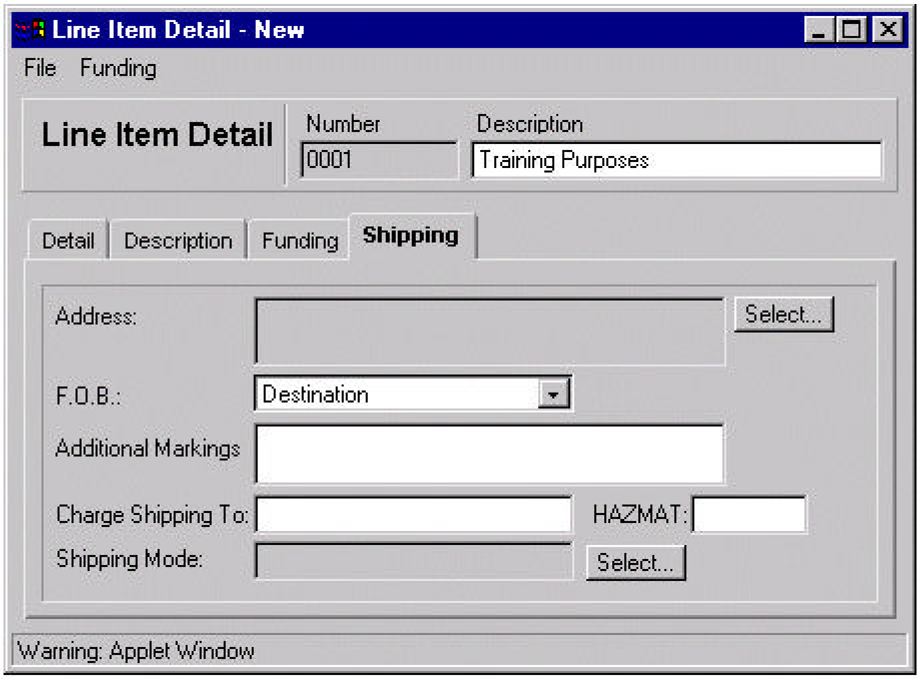

Figure 19: Line Item Detail – New – Shipping Tab

1. Click the [**Select**] button next to the **Address** field.

   The **Ship To Contact Search** window opens.

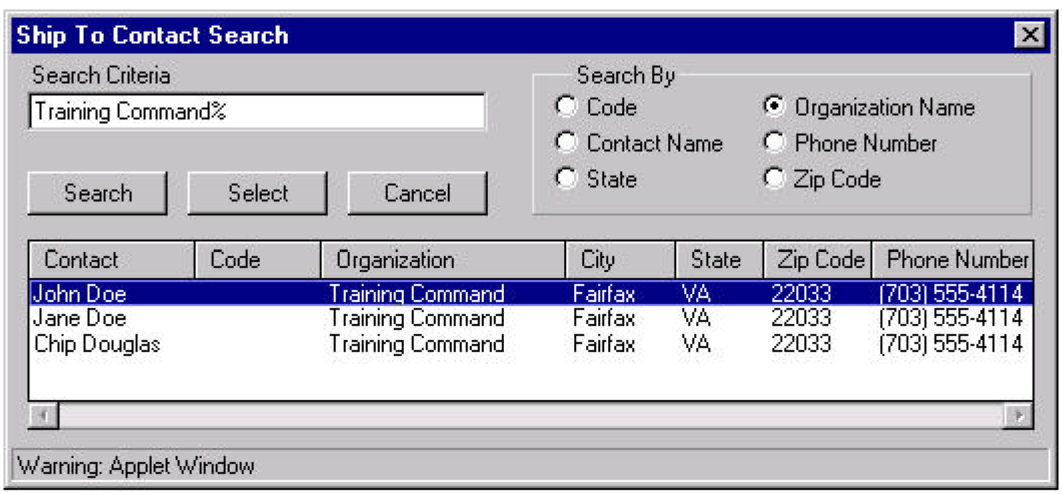

Figure 20: Ship To Contact Search Window

2. Click the [**Search**] button to search the PD^2 database for existing Ship To Address information.

3. Highlight the first address and click the [**Select**] button.

   The **Ship To Contact Search** window closes and the contact information displays in the *Shipping* tab.

4. Enter any additional shipping information.
5. Click the [**Select**] button to designate the mode of shipment in the **Shipping Mode** field.

   The **Shipping Mode Search** window opens.

6. Conduct a universal search for the Shipping Mode by clicking the [**Search**] button.
7. Highlight **Military Official Mail** and click the [**Select**] button.

   The **Shipping Mode Search** window closes and the Shipping Mode now displays in the **Shipping Mode** field.

8. Enter HAZMAT information in the **HAZMAT** field.
9. From the menu, select **File → Update**.

   The **Line Item – New** window closes and returns you to the **Purchase Request** window.

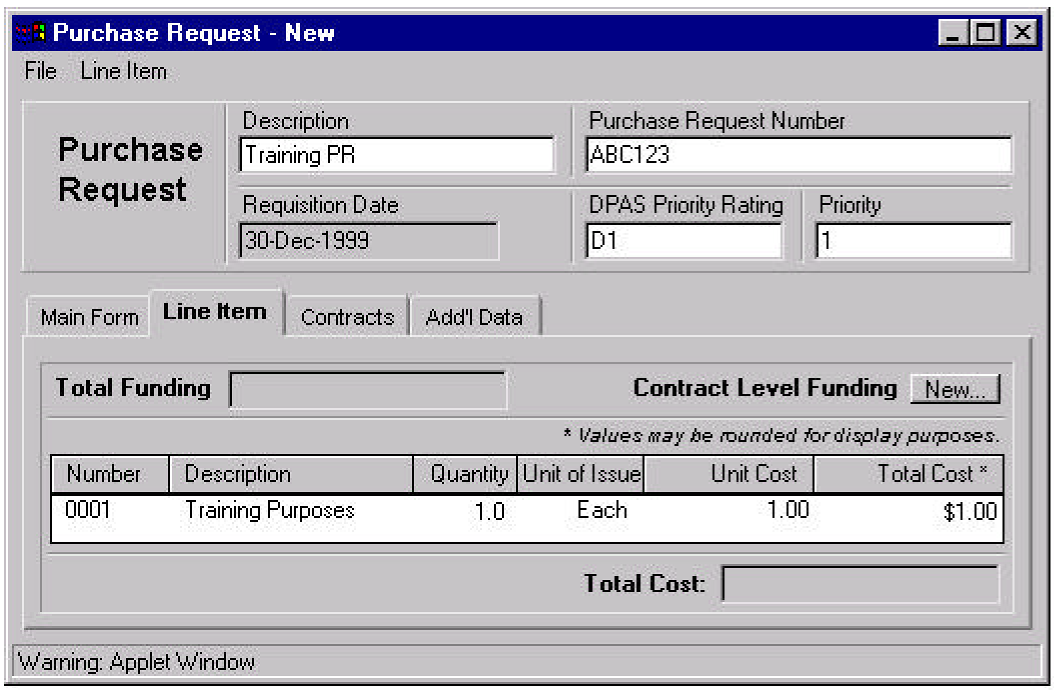

Figure 21: Purchase Request – New - Line Item Tab

1.3.2 Create a SubCLIN

The creation of a SubCLIN is similar to the creation of a CLIN. There are a few differences. For example, if you had a priced CLIN, the **CLIN Type** defaults to **Info Only** in accordance with the Defense Federal Acquisition Regulation (DFAR).

1. Highlight the CLIN you just created.
2. From the menu, select **Line Items → New → SubCLIN**.

The **Line Item Detail – New** window opens.

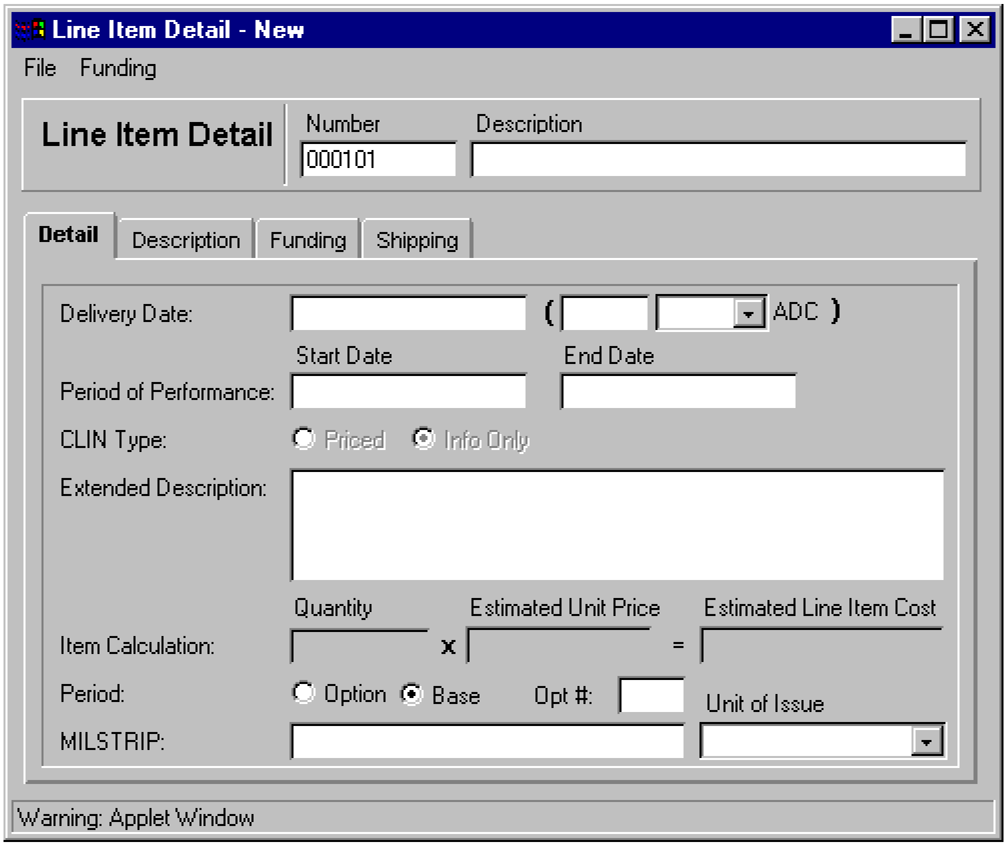

Figure 22: Line Item Detail – New – Detail Tab

Note: The SubCLIN Number defaults to the next sequential number. This field is editable and is visible from every tab of the **Line Item Detail** window.

3. Enter a description for the Line Item in the **Description** field.

Note: The **Description** field is visible and editable from every tab of the **Line Item Detail** window.

4. Enter a date for delivery in the **Delivery Date** field.
5. Enter a more detailed description of the Line Item in the **Extended Description** field.

Note: Since this is an Info Only SubCLIN you cannot enter *Item Calculation* information.

6. From the menu, select **File → Update**.

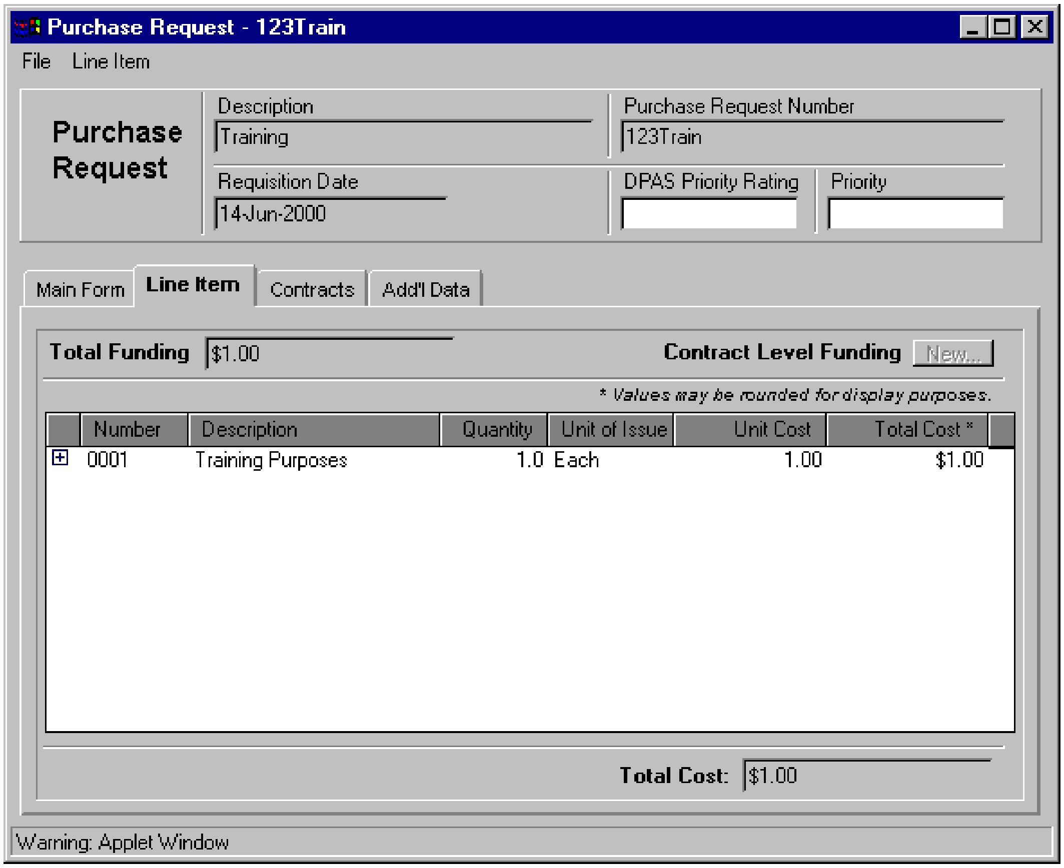

Figure 23: Purchase Request – New- Line Item Tab

Note: The blue [+] sign next to CLIN "*0001*" indicates that there is a SubCLIN associated with the CLIN.

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7. Click the blue [+] sign next to CLIN "0001" to display SubCLIN information.

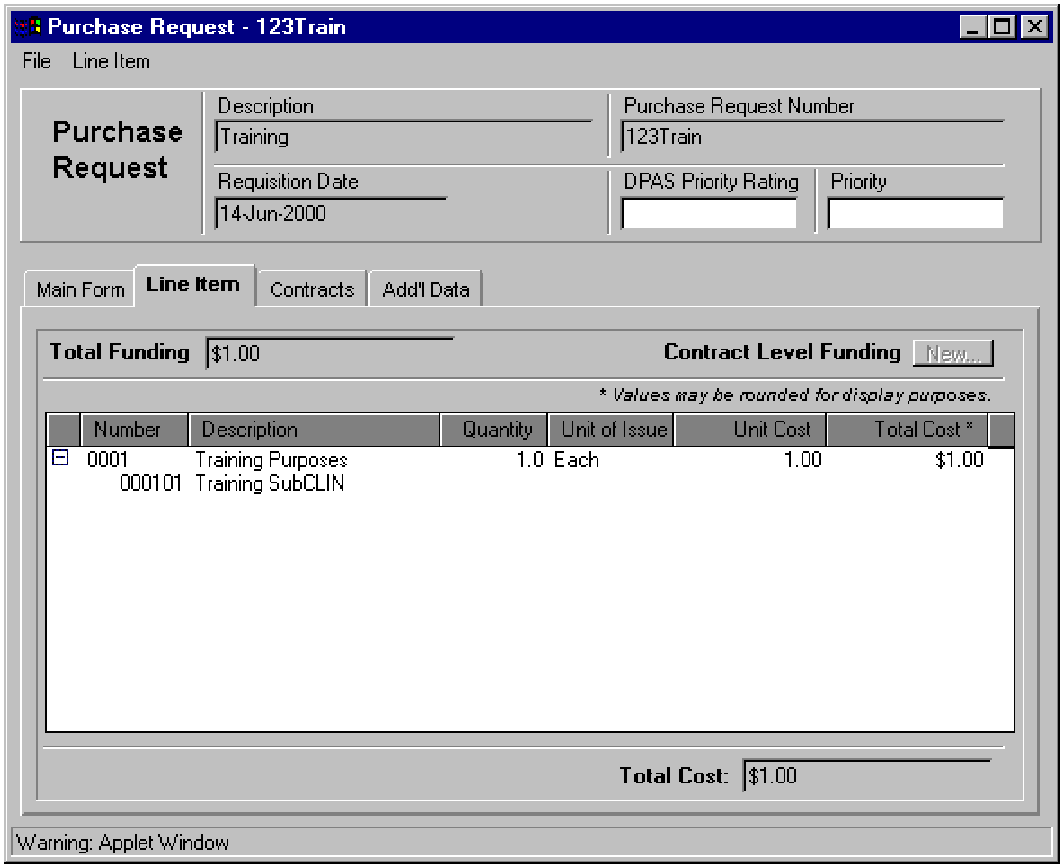

Figure 24: Purchase Request – New – Line Item Tab

1.4 Contracts Tab

The *Contracts* tab enables you to designate the **Suggested Contract Information**, **Contract Number** and **Suggested Preference Programs** by inputting the appropriate information into the respective fields.

1. Click the *Contracts* tab.

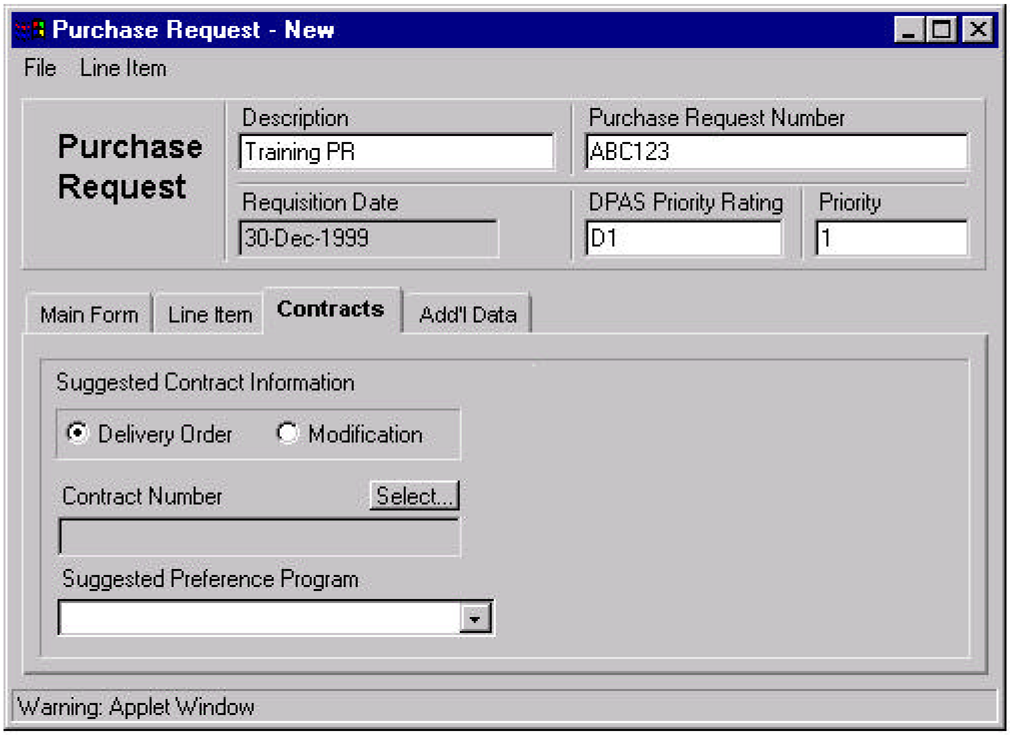

Figure 25: Purchase Request –New - Contracts Tab

2. Select the **Delivery Order** radio button.
3. Click the [**Select**] button in the **Contract Number** field to select a Contract Number.

   The **Attachment Search** window opens and displays all available Contracts in PD[2].

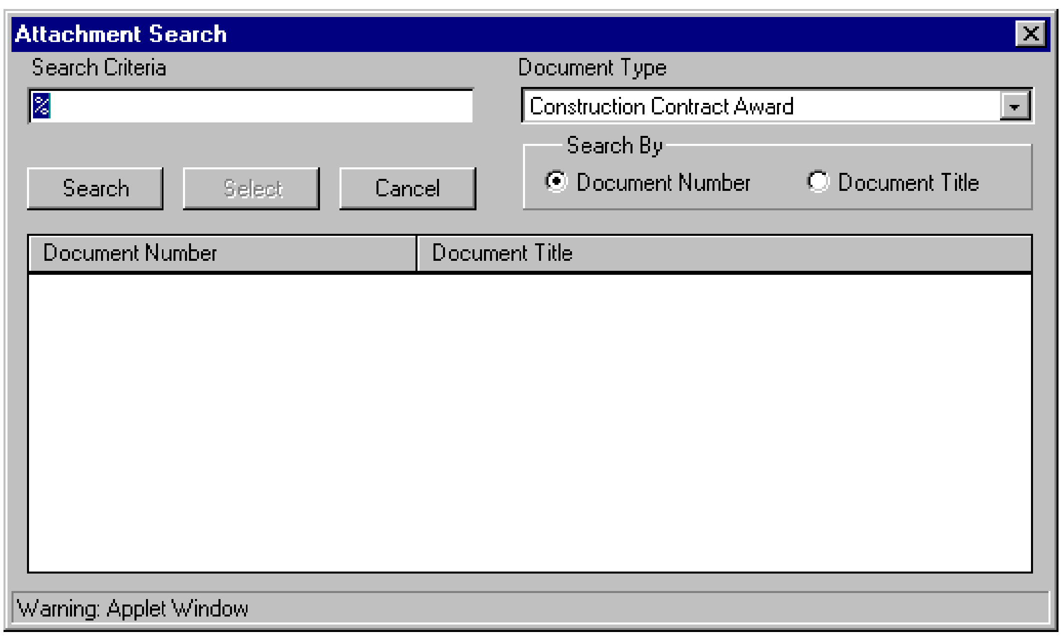

Figure 26: Attachment Search Window

4. Select a document type from the **Document Type** drop-down list box.
5. Click the [**Search**] button to display all available contracts.
6. Highlight a contract and click the [**Select**] button.

   The **Attachment Search** window closes and the **Contract Number** field displays the selected contract number.
7. Select a program preference from the **Suggested Preference Program** drop-down list box.

1.5 Additional Data Tab

The *Add'l Data* tab enables you associate additional information such as Point of Contact and Security Clearance classification information.

1. Click the *Add'l Data* tab.

Note: The **KO Notes** field is provided for the KO to input any additional information for the requirement in PD[2]. If the PR is returned to the *PRweb* use, the KO Notes will display.

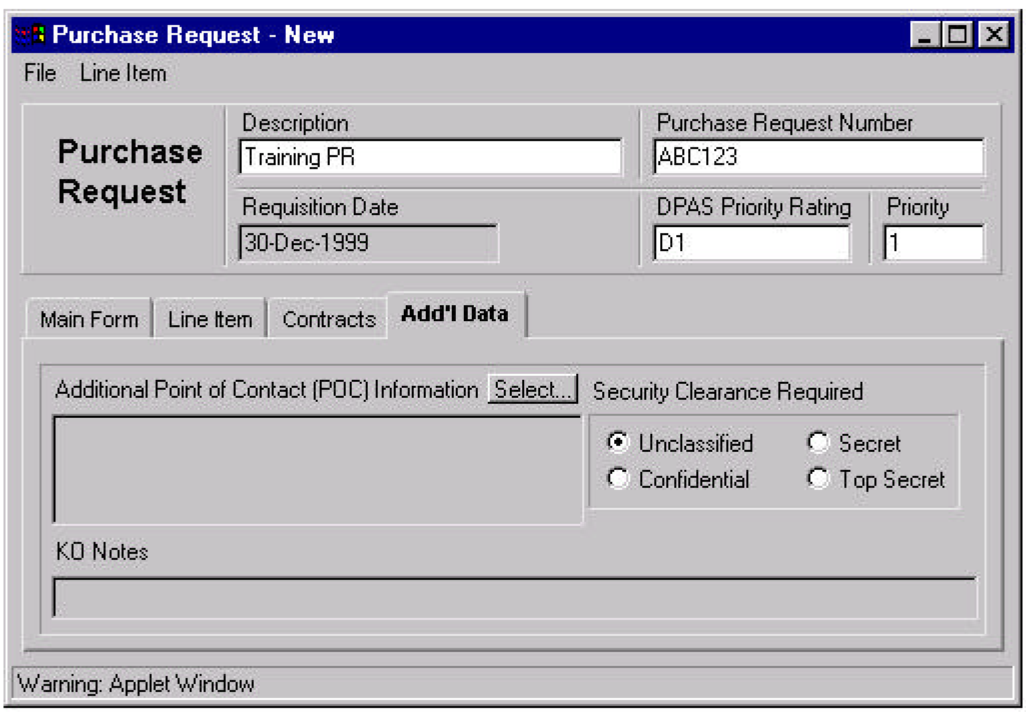

Figure 27: Purchase Request –New – Add'l Data Tab

2. From the menu, select **File → Save**.
3. From the menu, select **File → Exit**.
4. Click the [**Yes**] button on the **Save Confirmation** window to save the document.

Note: By clicking the **[Yes]** button you are saving the document. This is a good habit to get into to ensure that you have saved your PR. Once the PR is saved, the **Description** and **Purchase Request Number** fields are not editable. You can change the PR Number by selecting **Purchase Request → Renumber** from the desktop menu bar.

1.6 Hands-on Application: Viewing a PR Summary Report

You can view a summary of a particular PR. This summary provides a snapshot of your PR. You can view the cummary report within *PRweb*, then print it out if necessary.

To view a PR Summary, perform these steps:

1. Double-click on the *Drafts* folder to open it.
2. Highlight the PR that you just created.
3. From the menu, select **Purchase Request → View Summary.**

   The **Purchase Request Summary View** window opens.

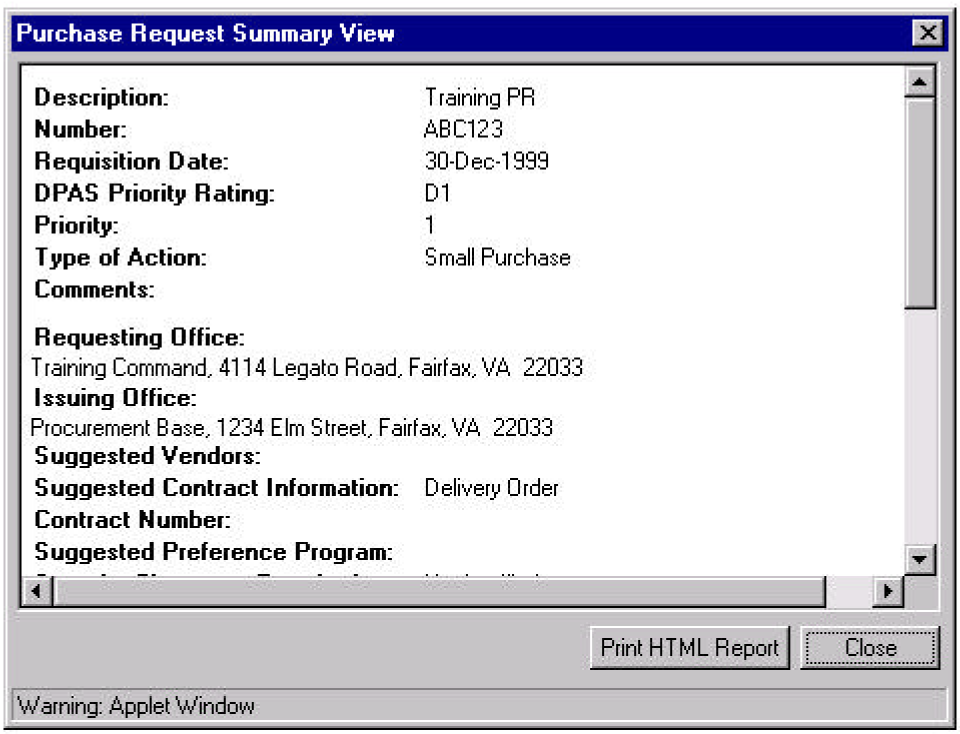

Figure 28: Purchase Request Summary View Window

4. Click the [**Print HTML Report**] button to begin the printing process.

   A **Browser** window opens and displays the summary report in HTML format.

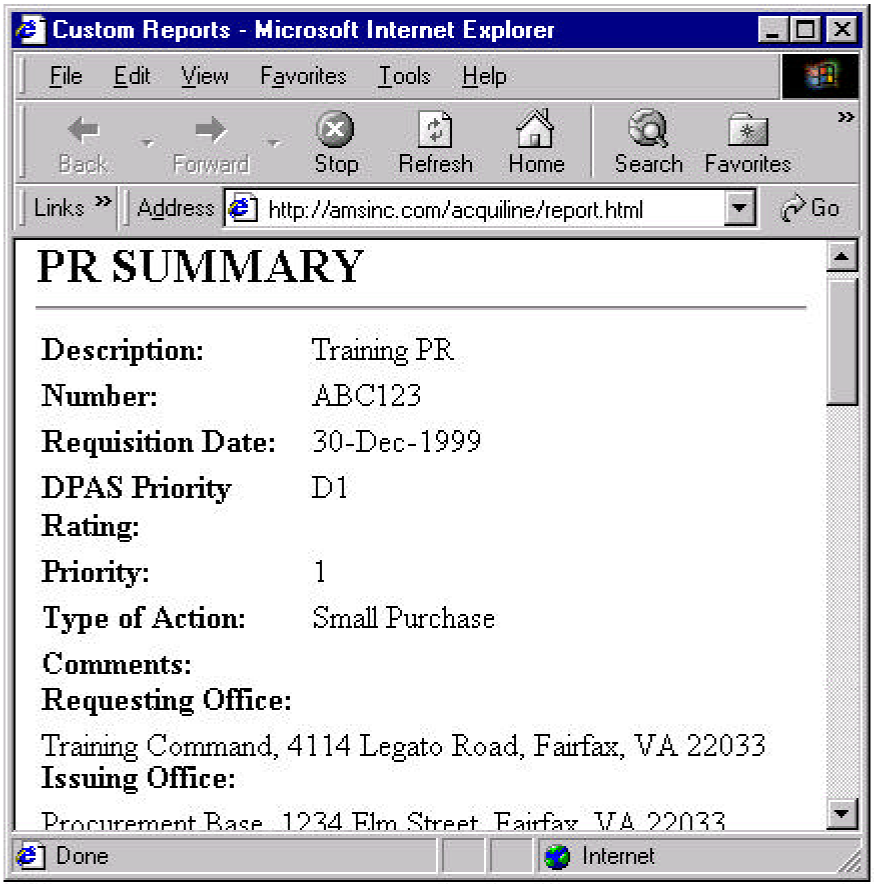

Figure 29: Custom Reports Window

5. To print the PR Summary report, select **File→ Print** from the browser menu.
6. From the menu, select **File → Close**.

   This returns you to the **Purchase Request Summary View** window.
7. Click the [**Close**] button to close the **Purchase Request Summary View** window and return to your desktop.

2. Attachments

You can add any procurement-related documents to the PR as an attachment. Although you can add any file type in *PRweb*, only Object Linking and Embedding (OLE) compatible files are readable in PD^2. Examples of OLE-compatible documents are Microsoft Office documents.

2.1 Adding an Attachment

1. On your desktop, double-click on your Drafts folder to open it.
2. Select the PR that you created in the previous topic.
3. From the menu, select **Purchase Request** → **Open**.

   The **Purchase Request** window will open.
4. From the menu, select **File** → **Attachments**.

   The **File Attachments** window will open.

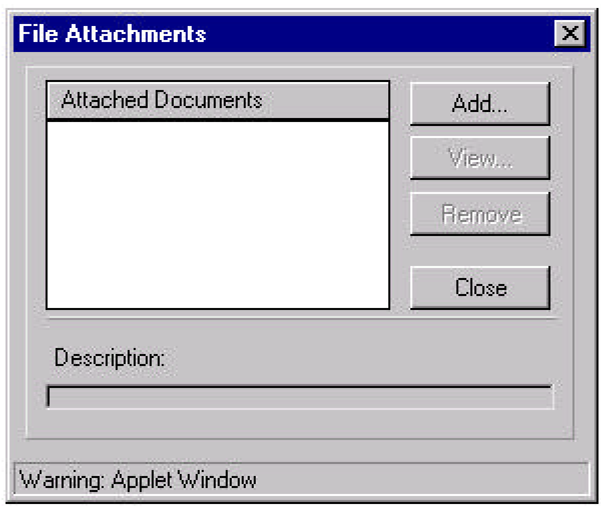

Figure 30: File Attachments Window

5. Click the [**Add**] button to add a new attachment.

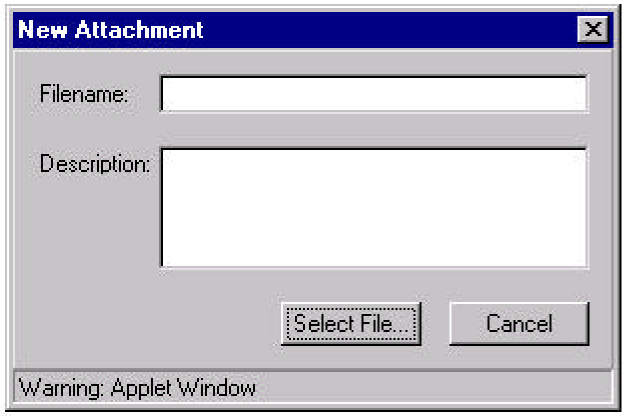

Figure 31: New Attachment Window

6. Enter the filename and extension of the document you want to attach in the **Filename** field.

7. Enter a description of the file you are attaching in the **Description** field.

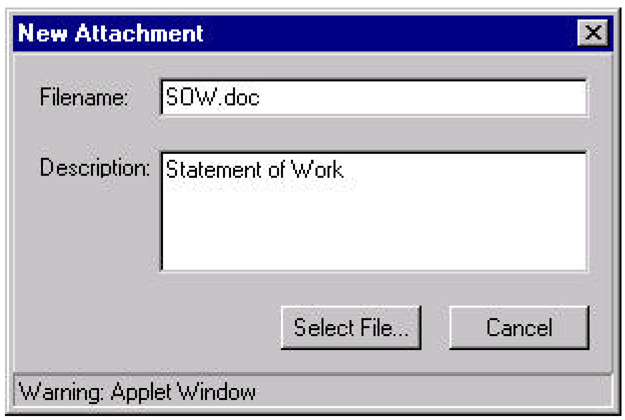

Figure 32: New Attachment Window

8. Click the [**Select File**] button to designate the path of the file you are attaching.

   A **Browser** window will appear. This window instructs you to upload the attachment.

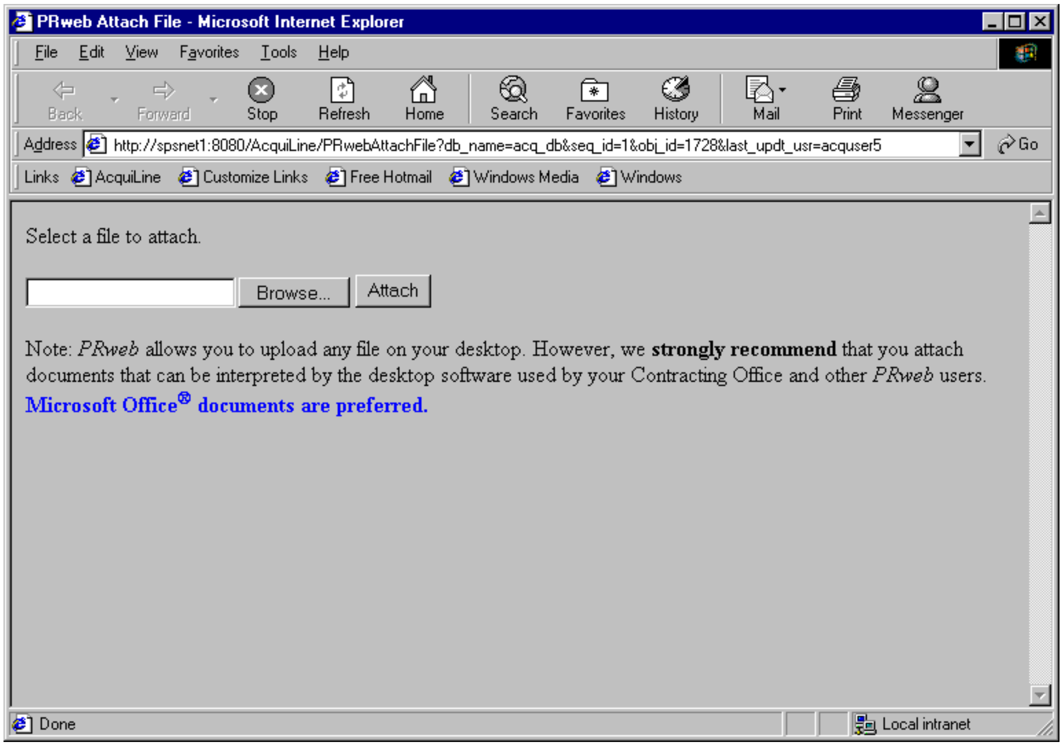

Figure 33: PRweb Attach File – Microsoft Internet Explorer Window

9. Click the [**Browse**] button to search for the path of the file you want to attach.

   The **Choose file** window opens.

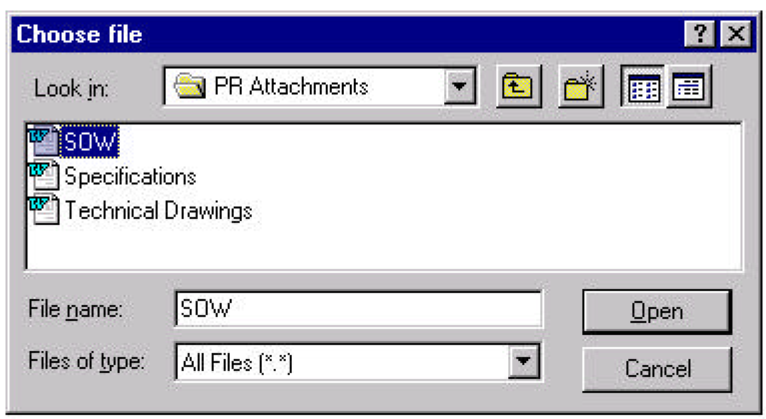

Figure 34: Choose File Window

10. Find the path of the file you want to attach, highlight the file, and click the [**Open**] button.

11. Click the [**Attach**] button to attach the file and its path to the PR.

    You will be notified of the document's successful attachment.

12. Click [**OK**] after you are notified that the file was attached successfully.

    The attachment will now show in the **Attached Documents** box.

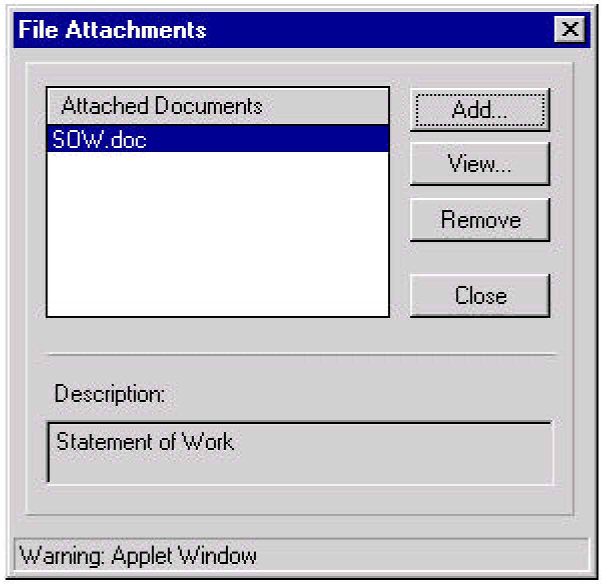

Figure 35: File Attachments Window

Note: The **Description** field below the **Attached Documents** field cannot be edited.

2.2 Viewing an Attachment

You can view an attachment that has been added to a PR. This would be applicable if a PR was routed to you and you needed to view the attached documents.

1. From the PRweb user's desktop, open a PR.
2. From the menu, select **File → Attachments**.

    The **File Attachments** window opens.

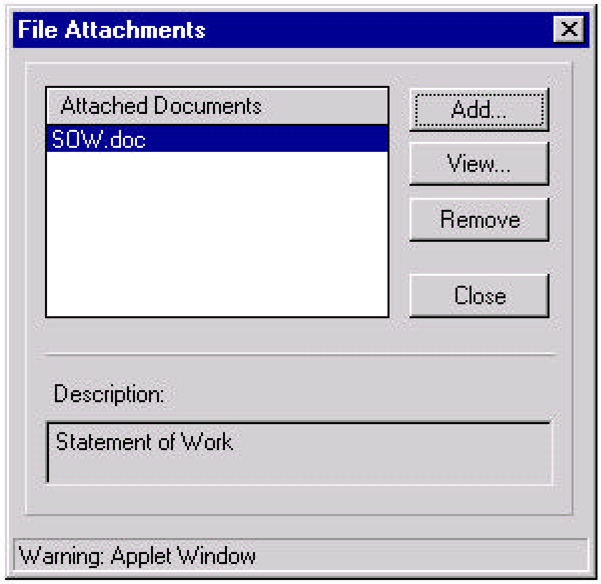

Figure 36: File Attachments Window

3. Highlight the attached file, and click the [**View**] button.

   The **Viewing Instructions** window opens.

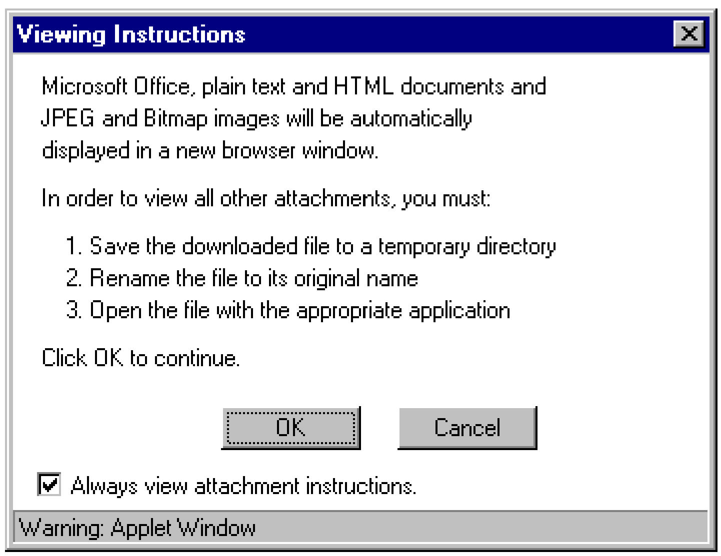

Figure 37: Viewing Instructions Window

4. Click [**OK**] after taking note of the instructions.

Note: If changes were made to the attachment, the user must remove the original object and re-attach the updated object.

2.3 Removing an Attachment

You can also remove files that you have attached to the PR.

In the **File Attachments** window, highlight the attached file you want to remove, and click the [**Remove**] button.

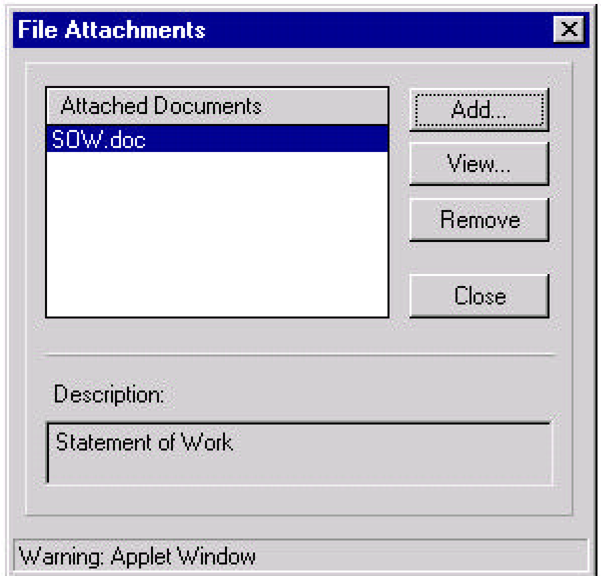

Figure 38: File Attachments Window

3. DD254

The **DD254** menu option enables you to attach a contract Security Classification Specification (DD254) to the PR. The DD254 is a form that deals with security issues pertaining to a PR. *PRweb* allows you to fill out the DD254 and associate it with a particular PR

1. From your desktop, open an existing PR.

2. From the menu, select **File → DD254.**

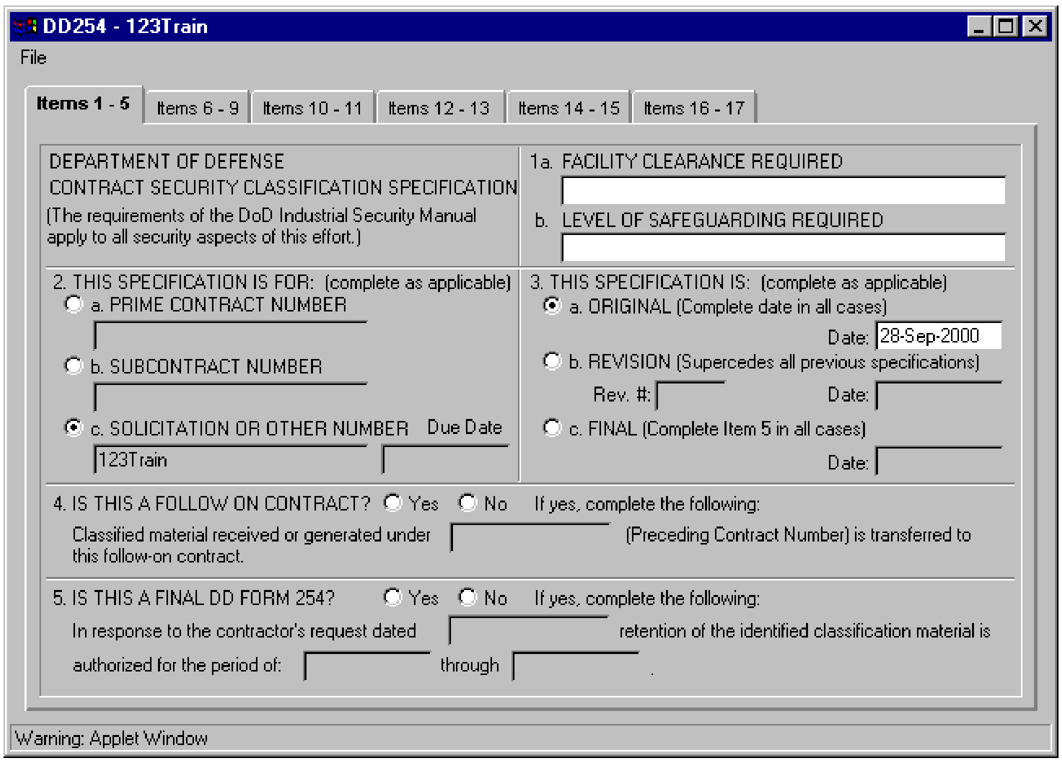

Figure 39: DD254 - <PR Number> Window

3. Enter the appropriate information to complete the DD254.

Note: The DD254 contains 6 tabs: **Items 1-5, 6-9, 10-11, 12-13, 14-15,** and **16-17**. Fill in all applicable information.

4. From the menu, select **File → Update** to return to the PR.

5. From the menu, select **File → Save**.

6. From the menu, select **File → Close** to return to the desktop.

4. Routing and Approval

PRweb supports the electronic routing and approval of PRs within *PRweb*. You can route PRs from *PRweb* to PD^2, and from PD^2 back to *PRweb*. You can also review the Approval History of a PR created in *PRweb* or PD^2. In addition, *PRweb* provides business level security groups that allows you to predetermine the approval process for a PR.

4.1 Route Templates

The ability to create personal route templates is granted at the security group level. Members of security groups with access to route to all users can create personal route templates to complement approval processes. Templates are a predefined route that the PR travels from creation to final approval. Route templates that you create will only be available on your user account.

4.1.1 Hands-on Application: Creating Route Templates

1. From the menu, select **Preferences → Route Templates**.

   The **Templates** window opens.

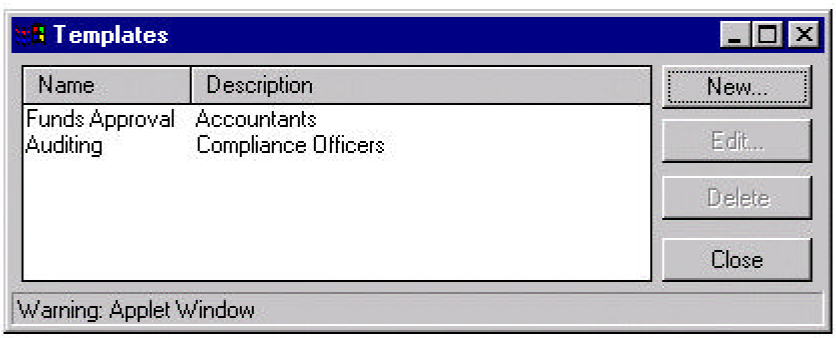

Figure 40: Templates Window

2. Click the [**New**] button.

   The **Template – New** window opens.

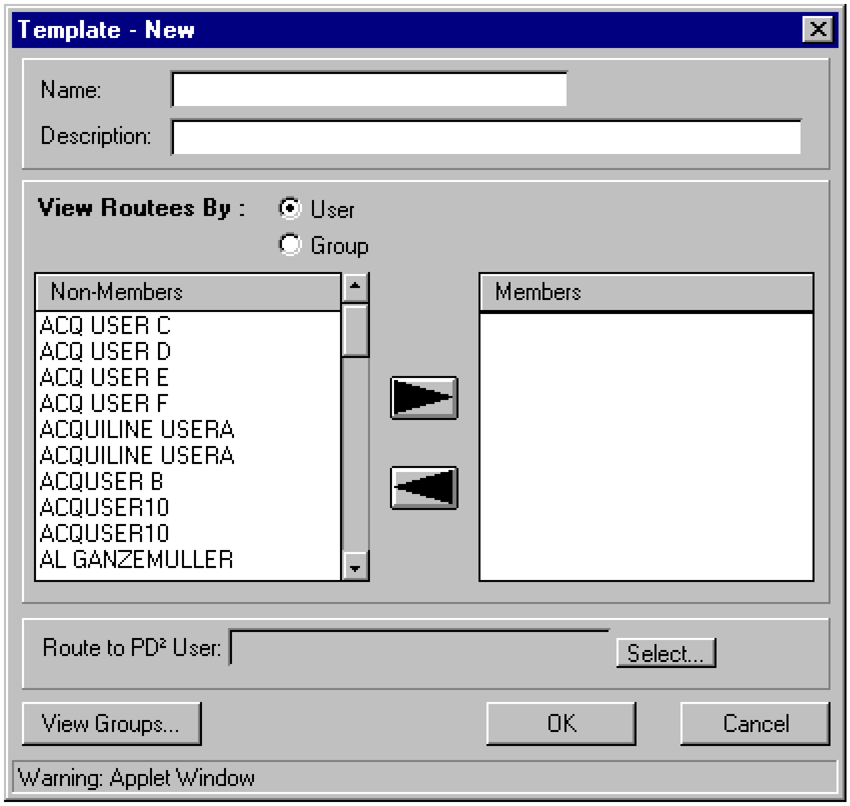

Figure 41: Template – New Window

3. Enter a name for the template in the **Name** field.
4. Enter a description of the template in the **Description** field.
5. Select the appropriate **View Routees By** radio button.

Note: The **Non-Members** list box displays all available users or groups to add to the routing sheet. As users are added to the route template their user name or group name displays in the order they were selected in the **Members** list box. Members must be placed in routing order on the routing sheet. The user in the zero position is the creator of the PR and cannot be deleted from the routing sheet.

---

6. Select members for the new template by highlighting desired non-member(s) and clicking the [▸] button.

Note: For training purposes, you can select any one user to the route template.

---

7. Click the [**Select**] button to select a **Route to PD^2 User**.

Note: The **Route to PD^2 User** identifies the Contracting Representative who will initially receive this PR.

Figure 42: Select PD^2 User Window

The **Select PD^2 User** window opens and displays all available PD^2 users.

8. Highlight the **System Administrator** and click the [**Select**] button.

   The System Administrator displays in the **Route to PD^2 User** field.

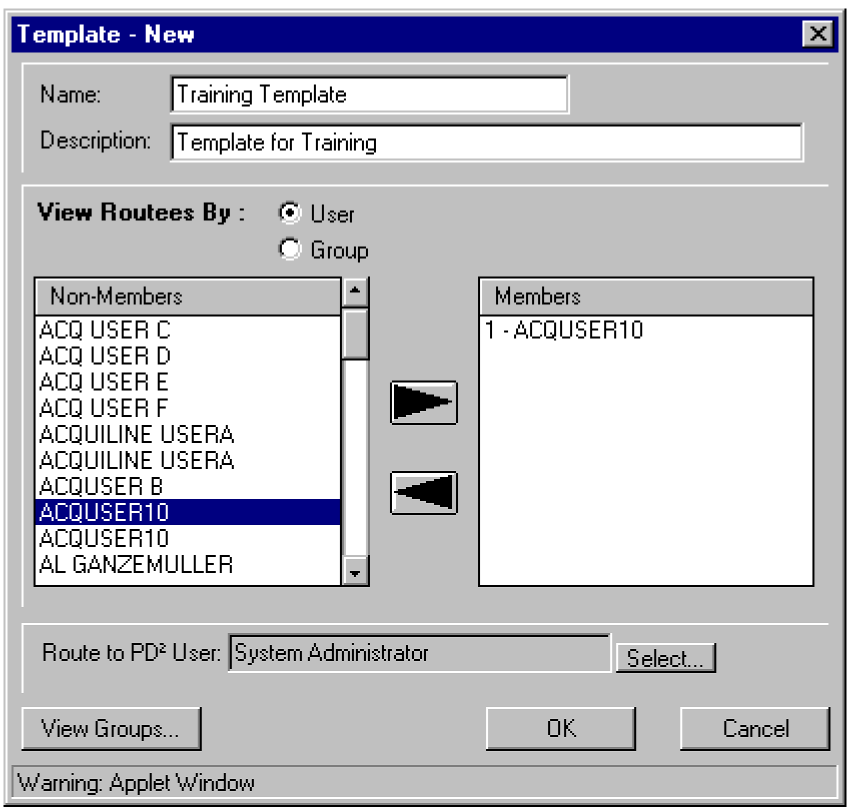

Figure 43: Template – New Window

9. Click [**OK**] to save the new template and close the **Template – New** window.

4.1.2 Hands-on Application: Editing Route Templates

You can edit existing route templates to add or remove users from the template.

1. Highlight the route template you just created.
2. Click the [**Edit**] button.

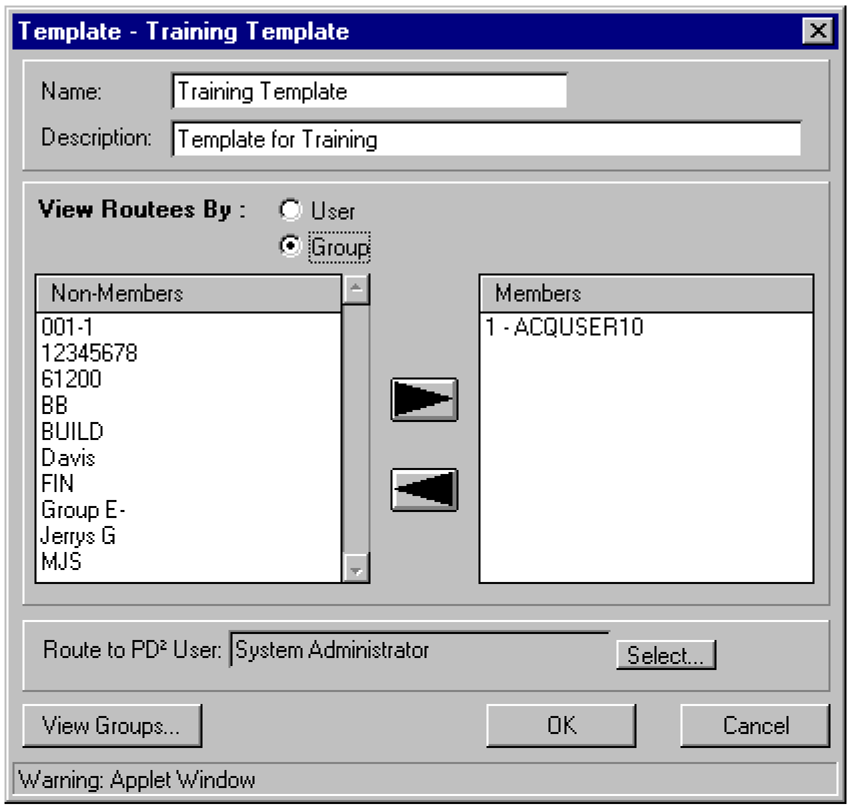

Figure 44: Template - <Template Name> Window

Note: The template name in the **Name** field is not editable.

---

3. Select additional members for the template by clicking the appropriate **View Routees By** radio button and highlighting users or groups in the Non-Members window and clicking the [▸] button.
4. Remove members from the template by highlighting desired members(s) and clicking the [◂] button.
5. Select a different PD^2 user to route to by clicking the [**Select**] button next to the **Route to PD^2 User** field. Then highlight the desired PD^2 user and click [**Select**].
6. Click [**OK**] to save the changes and close the **Template** window.
7. Click the [**Close**] button to return to the desktop.

4.1.3 *Hands-on Application: Deleting Route Templates*

You can delete route templates if necessary.

1. In the **Template** window, select a route template that you wish to delete.
2. Click the [**Delete**] button.
3. Click the [**Close**] button to return to the *PRweb* desktop.

4.2 Hands-on Application: Routing a Purchase Request

You can route PRs within *PRweb* to other registered requesting agents. Routing the PR within *PRweb* facilitates the Requirements approval process by electronically sending the document to the appropriate approving authorities. If you have custom routing privileges, you can route a PR to one or more users, to groups, or via a template. Otherwise, you must route via one of the templates assigned to you.

Note: This application presumes that the user has the security privileges to create a custom routing sheet.

---

1. Highlight your PR in the **Drafts** folder.
2. From the menu, select **Purchase Request → Route**.

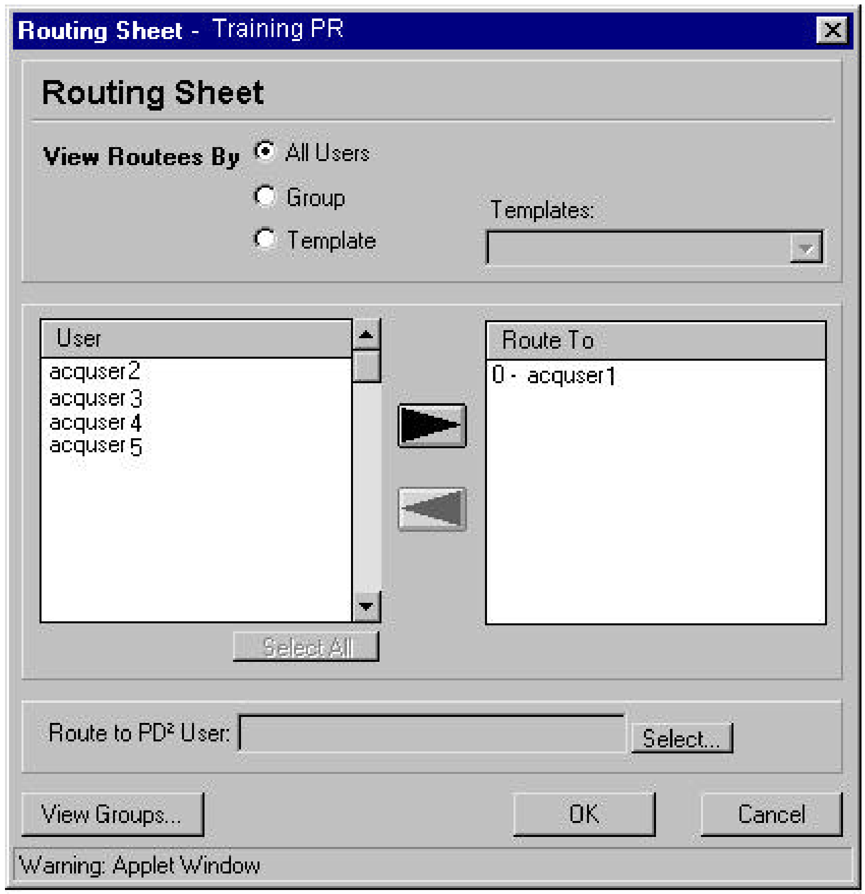

Figure 45: Routing Sheet - <PR Name> Window

Note: You can add users to the routing sheet. The creator of the PR is automatically added to the **Route To** list. You can display user lists by **All Users**, **Groups** and **Template**. Selecting the **All Users** radio button displays a list of all active user accounts to choose from. Selecting the **Groups** radio button displays a list of all groups created by the System Administrator. Selecting the **Template** radio button activates the drop-down menu list displaying all applicable route templates.

---

3. Highlight the user sitting to your right from the **User** list.
4. Click the [►] button.

Note: To remove a user from the routing sheet, highlight the desired user in the **Route To** field and click the [◄] button

---

5. Click the [**Select**] button for the **Route to PD^2 User**.

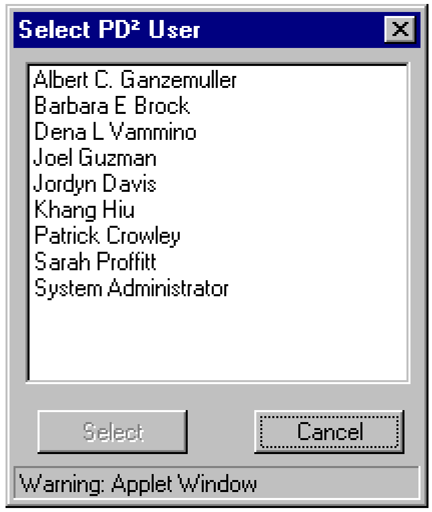

Figure 46: Select PD^2 User Window

6. Highlight the desired PD^2 user to whom you want the PR to be sent.

Note: You must select a PD^2 user from the PD^2 database before you can continue. For the purposes of this lesson, select the PD^2 Administrator only. Once the PR has left your desktop, *PRweb* treats it as if you have approved it. All users on the routing sheet must also approve the PR. When all users identified on the routing sheet have approved the PR, the PR will be submitted to the PD^2 user selected.

---

7. Click the [**Select**] button.

Note: Once the PR has been submitted into PD^2, it will be displayed in your **Archive** folder.

---

8. Click [**OK**] to Route the PR to the designated user.

   The PR now displays in the creator's **Outbox**, and in the **Inbox** of the next user on the routing sheet. If the PR does not display in the appropriate folder, you must refresh the desktop. From the menu, select **File → Refresh All** to refresh the desktop.

4.3 Hands-on Application: Approving a PR

The creator of the PR automatically approves the PR. When you are identified on a routing sheet, you will receive the associated PR in your Inbox. You can review the contents of the PR before you approve it by opening the PR.

1. Open your **Inbox** folder by double-clicking on it.

2. Highlight the PR from the person sitting to your left in your **Inbox** folder.

Note: You can review the contents of the PR if necessary by opening it.

---

3. From the menu, select **Purchase Request → Approve**.

Figure 47: Approval - <PR Name> Window

Note: **Approved** is the default option in the **Status** drop-down box.

4. Select the "approved" option from the **Status** drop-down list box to approve the PR.

Note: You can also include any additional notes in the **Comments** field. You can select "rejected" or "contingent" from the **Status** drop-down list box if you want to reject the PR or mark it with a contingent status, respectively.

5. Click [**OK**] to apply the status to the PR.

Note: The PR will appear in the creator's **Archive** folder after it has been fully approved and sent to PD^2.

Note: An e-mail alert will be sent to All users on the routing sheet when a PR is marked "Rejected" or "Contingent".

4.4 Hands-on Application: Viewing Approval History

The **Approval History** feature enables you to view the approval trail of a PR. Any user who is in the Approval process can view the approval history of a PR before approving it.

1. From the menu, select **File → Refresh All**.
2. Open the **Archive** folder.
3. Highlight the PR you just created.
4. From the menu, select **Purchase Request → View Approval History**.

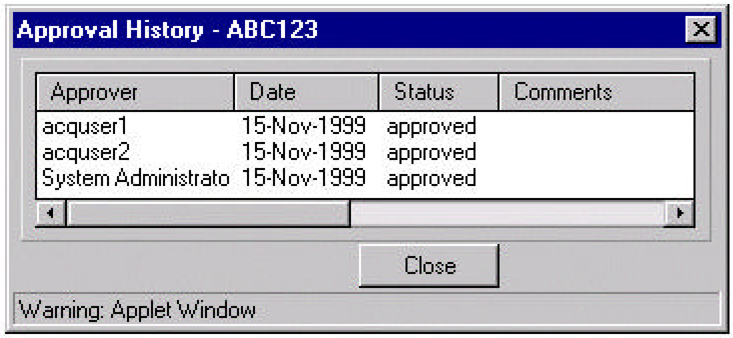

Figure 48: Approval History - <PR Name> Window

Note: All of the users that approved the PR are listed with the date and status, along with any comments that can have been made. If the PR was rejected by a user, the applicable comments would also display.

---

5. Click the [**Close**] button to return to your desktop.

Note: Once the PR has been approved by all designated approving authorities, the PR moves from the **Outbox** to the **Archive** folder.

4.5 Hands-on Application: Changing Archive Days for Approved PRs

Once all user's designated on the routing sheet approve a PR, it goes into your **Archive** folder. It is visible in your **Archive** folder for a specified number of Archive Days. Once this number of days has passed, the PR is no longer visible in the **Archive** folder. The PR is no longer visible on your desktop but has not been deleted from the *PRweb* database.

1. From the menu, select **Preferences → Change Archive Days**.

   The **Archive Days** window opens.

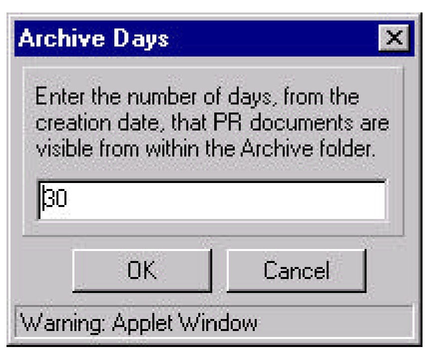

Figure 49: Archive Days Window

Note: The System Administrator sets the Archive Days default value. However, you can edit this field and override the default value.

---

2. Change the number of days to the desired number.

3. Click [**OK**] to close the window and return to your desktop.

4.6 Instructor Demonstration: Return-Routing a PR from PD^2 to *PRweb*

Once all users in *PRweb* have approved the PR, it is routed to PD^2 where it can be reviewed and approved or sent back to *PRweb* for changes. If the Contract Specialist using PD^2 rejects the PR for any reason, he/she can return the PR to *PRweb* for corrections.

1. Log in to PD^2.

Note: If you have PD^2, log in as the user that you routed the PR to.

---

2. Open the **Inbox**.

3. Open the folder containing the routed PR.

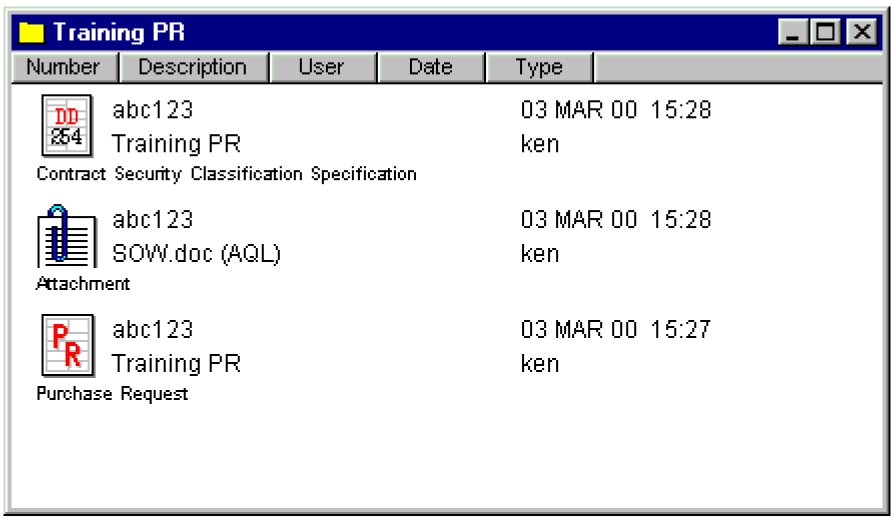

Figure 50: Training PR Window

4. Highlight the PR.

5. From the menu, select **Procurement →Requirements → *PRweb* → Return to *PRweb***.

6. Click [**OK**] when the **Return Route Confirmation** dialog box opens.

7. Click [**OK**] when the **PR returned to *PRweb*** dialog box opens.

8. Log out of PD^2.

9. Log in to *PRweb*.

   The PR no longer displays in any of your PD^2 desktop cabinets.

5. Reports

PRweb provides two types of reports: **PR Status Reports** which enable the user to track the procurement process of a PR, and **Standard Reports** which provide business process queries.

5.1 Instructor Demonstration: Generating a PR Status Report

The **PR Status Report** feature enables the user to track the progress of a PR after it has been submitted to the Contracting Office. The PR Status Report provides a snapshot of the PR, Milestone Plan, Solicitation, and Award document.

1. From the menu, select **Purchase Request → PR Status Report**.

   The **PR Status Report** window opens.

2. Enter the number of the PR in the **Search Criteria** field followed by the universal search symbol (%) to generate a report.

3. Select the **PR No.** radio button.

Note: The **PR No.** radio button allows the user to search by PR number. The **Desc.** radio button allows the user to search by PR description.

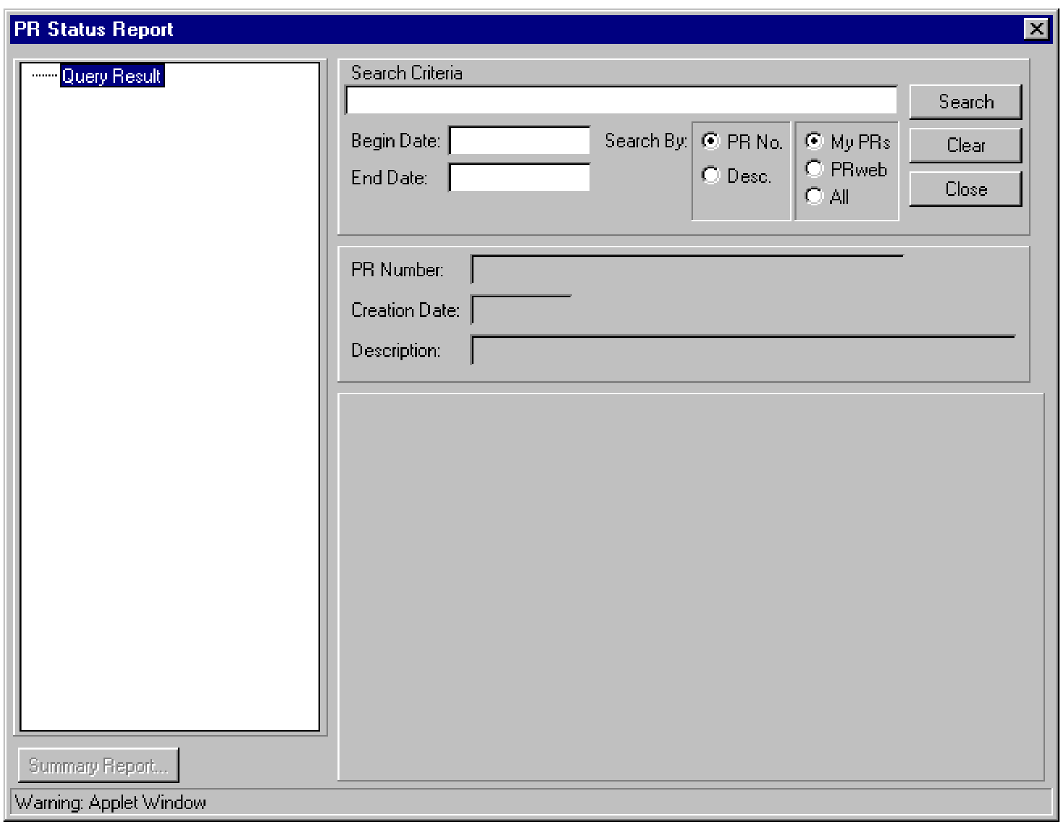

Figure 51: PR Status Report Window

4. Select the **My PRs** radio button.

Note: The **My PRs** radio button allows the user to display only PRs that were created by that user. The **PRweb** radio button allows the user to display all existing PRs that have been created in the AcquiLine *PRweb* module. The **All** radio button allows the user to see the PRs that were created in PD^2.

---

5. Enter a start date in the **Begin Date** field. This date must be the same as or earlier than the creation date of your PR.

Note: The date should be in the Month/Day/Year (MM/DD/YYYY) format.

---

6. Enter an end date in the **End Date** field.

Note: This date must be the same or later than the creation date of the PR.

---

7. Click the [**Search**] button to search for the results matching the criteria entered.

   A dialog box displays the number of records returned and asks if the user wishes to proceed.

8. Click [**OK**] to continue.
9. Click the [+] button next to **Query Result** to display the PRs.
10. Click the [**Summary Report**] button to view a summary of the status of all PRs displayed.
11. Double-click a PR Number to view a summary of that PR.
12. Click the [+] button next to the folder with the PR Number you just created.

Note: Three sub-folders display: **Award, Solicitation** and **Milestone**. You can double-click any one of the three items to view detailed information.

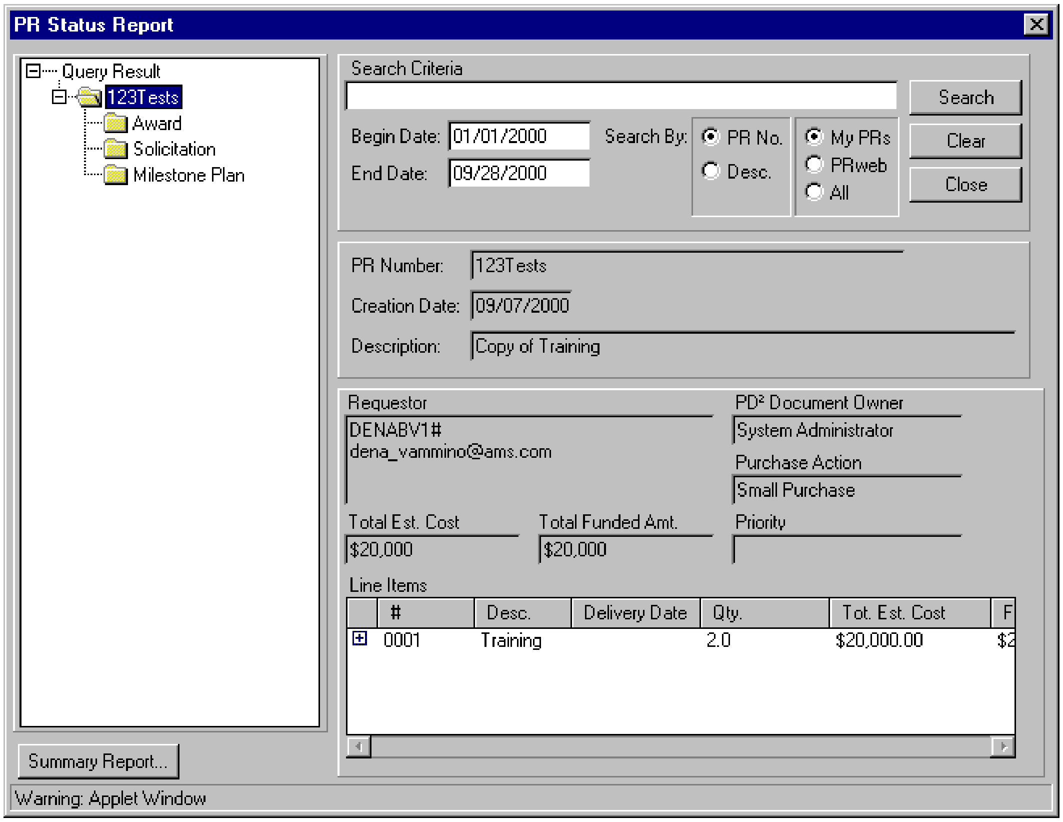

Figure 52: PR Status Report Window

13. To clear the selection criteria, click the [**Clear**] button.

Note: New criteria can now be entered.

14. Click the [**Close**] button to exit the **PR Status Report** window and return to your desktop.

5.2 Instructor Demonstration: Standard Reports

The Standard Reports feature enables users to generate reports, pulling information directly from the *PRweb* and PD^{2}databases. Currently there are three Standard Reports available: **PRweb Locator Report**, **View Canceled PR Status**, and **View Open PR Status**.

5.2.1 PRweb Locator Report

1. From the menu, select **Purchase Request → Standard Reports**.

   The **Standard Reports** window opens.

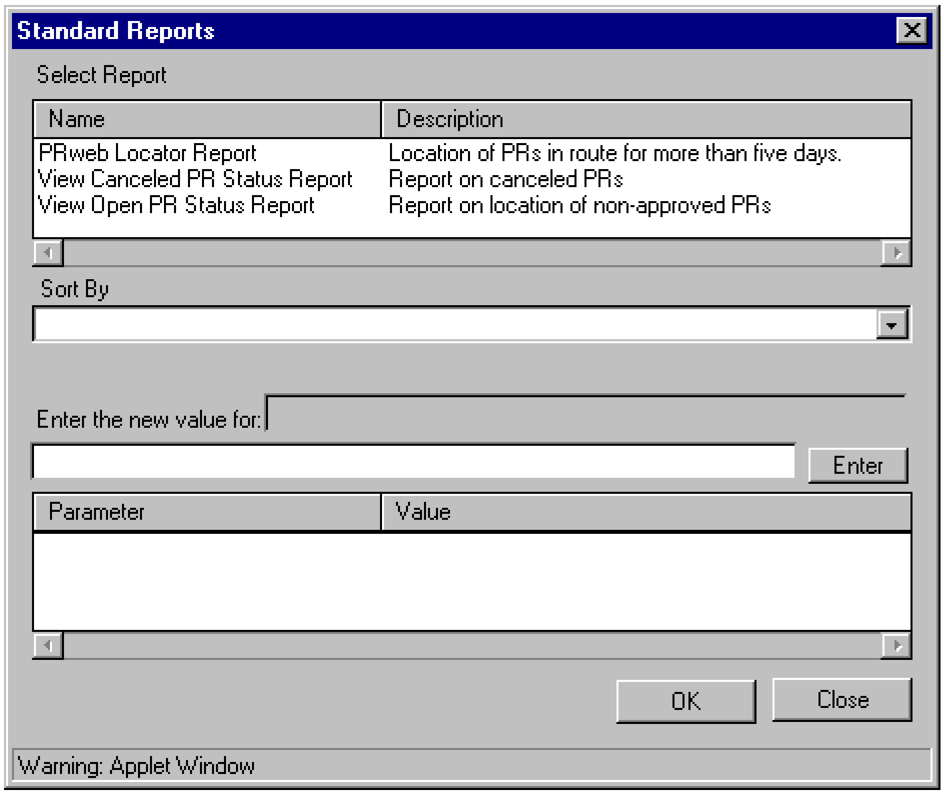

Figure 53: Standard Reports Window

2. Double-click the **PRweb Locator Report** option in the **Select Report** panel.

Note: The **PRweb Locator Report** provides a list of all PRs that have been in route in *PRweb* for more than five days. The report displays associated information for each of these PRs including the user who caused the delay and the number of days that the PR was delayed. The report also displays the current station and the number of days in that station.

---

3. Select "*PR Number*" from the **Sort By** drop-down list box.

Note: The **Sort By** drop-down list box enables you to further define the search results (e.g., you can sort PRs and display them by PR Number or Description).

4. Double-click "*BEGIN_DATE*" in the **Parameter** field.

Note: The **Parameter** field enables you to further define the search results. For example, if you want to view PRs created on a specific day, enter that date in the **Enter the new value for** field above the **Parameter** table.

5. Click [**OK**] to generate the report.

   The **PRweb Locator Report** window opens.

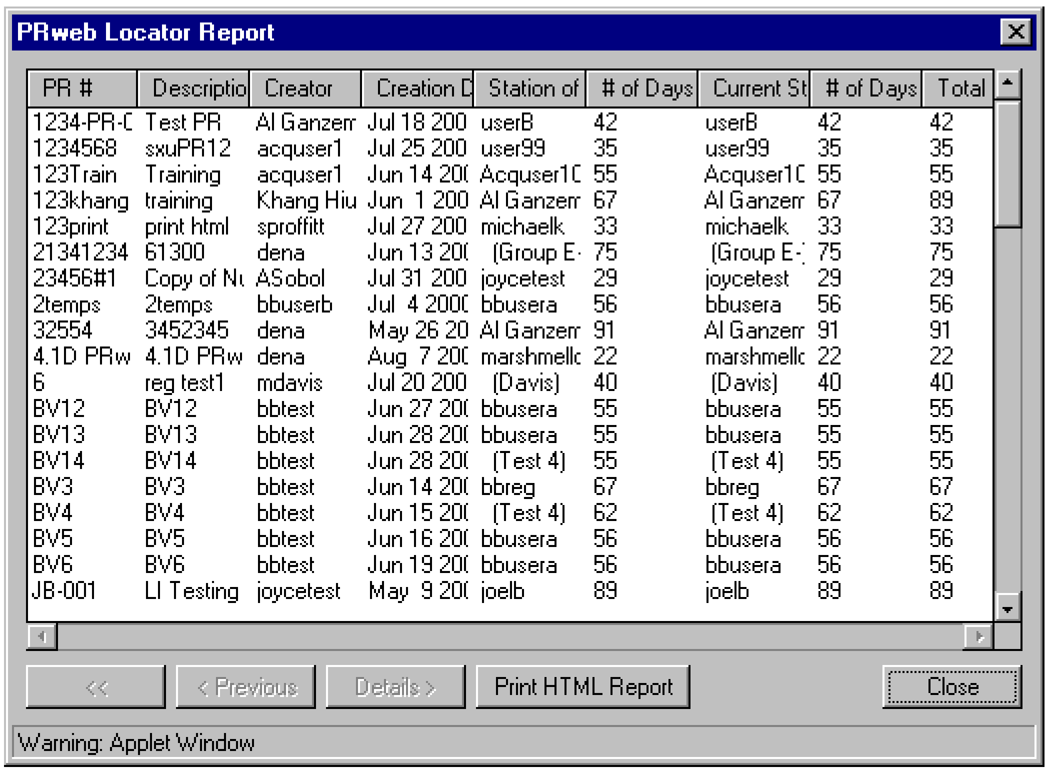

Figure 54: PRweb Locator Report Window

Note: You can click the [<<], [**Previous**], [**Details**], or [**Print HTML Report**] button to aid in the report generation process.

6. Click the [**Print HTML Report**] button.

   The report details display in the browser.

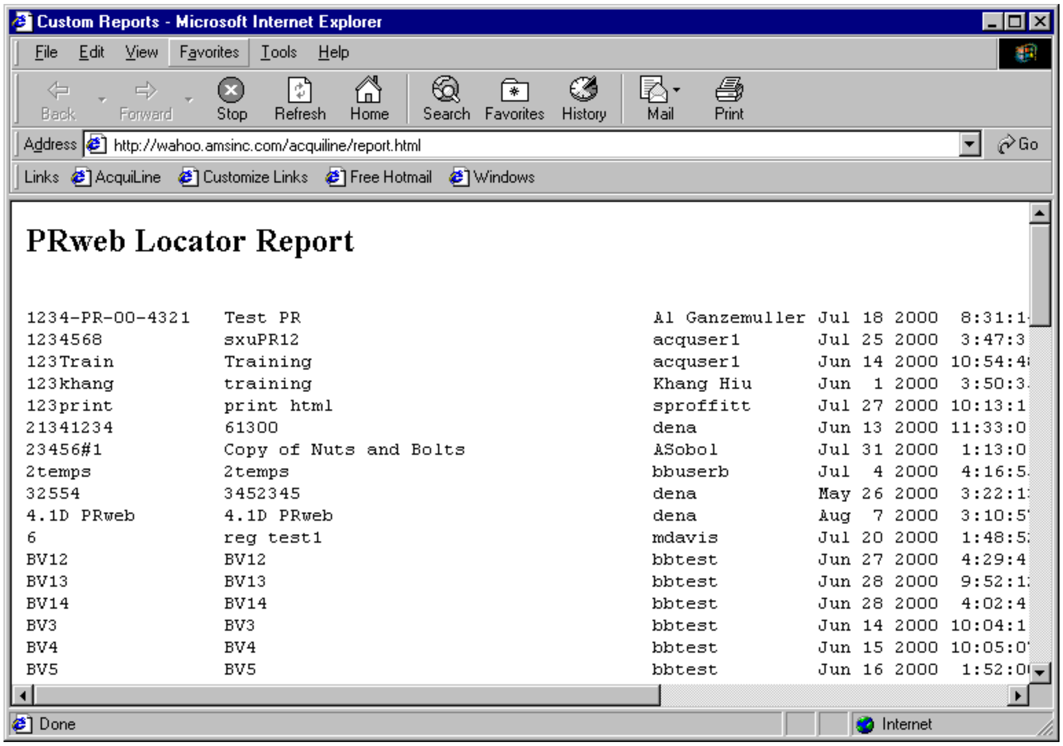

Figure 55: Custom Reports – Microsoft Internet Explorer Window

7. From the menu, select **File → Print** to print the report.
8. From the menu, select **File → Close**.

   The **PRweb Locator Report** window opens.
9. Click the [**Close**] button to return to the **Standard Reports** window.
10. Click the [**Close**] button to close the **Standard Reports** window and return to your desktop.

5.2.2 View Canceled PR Status Report

1. From the menu, select **Purchase Request → Standard Reports**.

   The **Standard Reports** window opens.

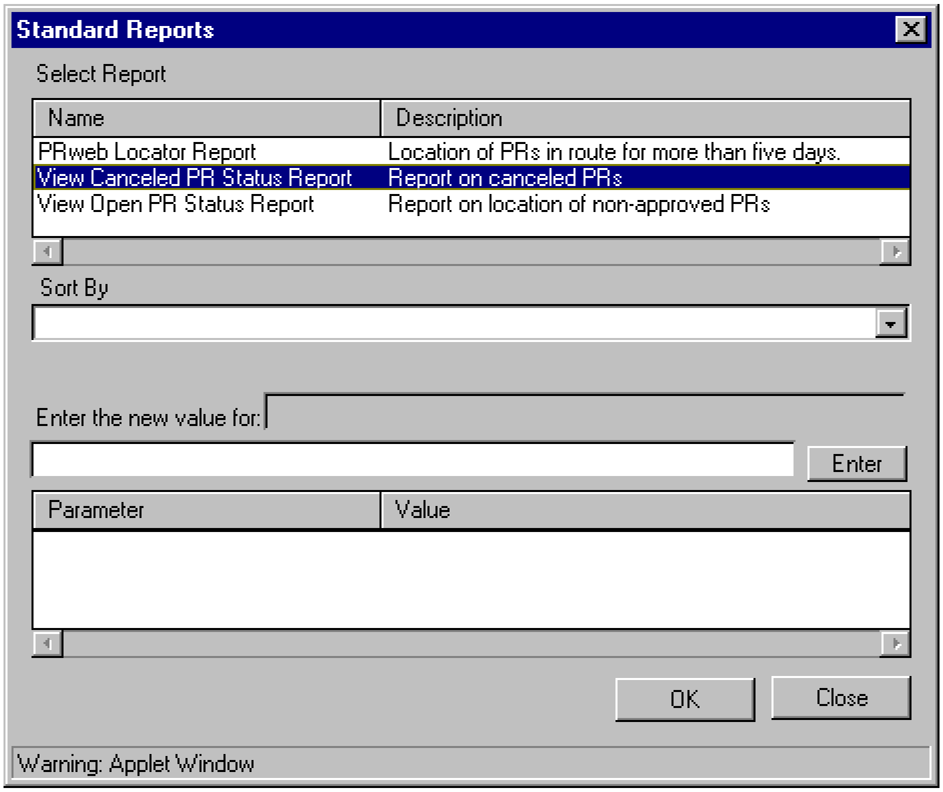

Figure 56: Standard Reports Window

2. Double-click the **View Canceled PR Status Report** option in the **Select Report** panel.

3. Select "*ORIGINATOR*" from the **Sort By** drop-down list box.

Note: The **Sort By** drop-down list box enables you to further define the search results (e.g., you can sort PRs and display them by PR Number or Description).

---

4. Double-click "*BEGIN_DATE*" in the **Parameter** field.

Note: The **Parameter** field enables you to further define the search results. For example, if you wanted to view PRs created on a specific day, enter that date in the **Enter the new value for** field above the **Parameter** table.

---

5. Click [**OK**] to generate the report.

   The **View Canceled PR Status Report** window opens.

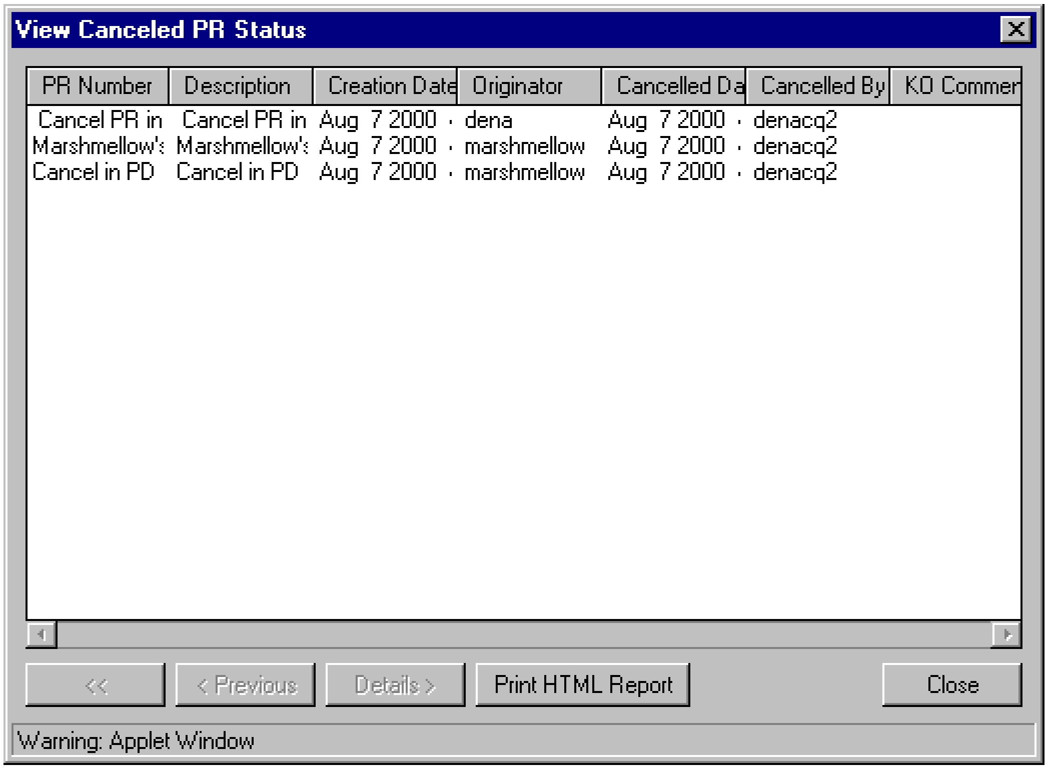

Figure 57: View Canceled PR Status Window

Note: You can click the [<<], [**Previous**], [**Details**], or [**Print HTML Report**] button to aid in the report generation process.

---

6. Click the [**Print HTML Report**] button.

   The report details display in the browser.

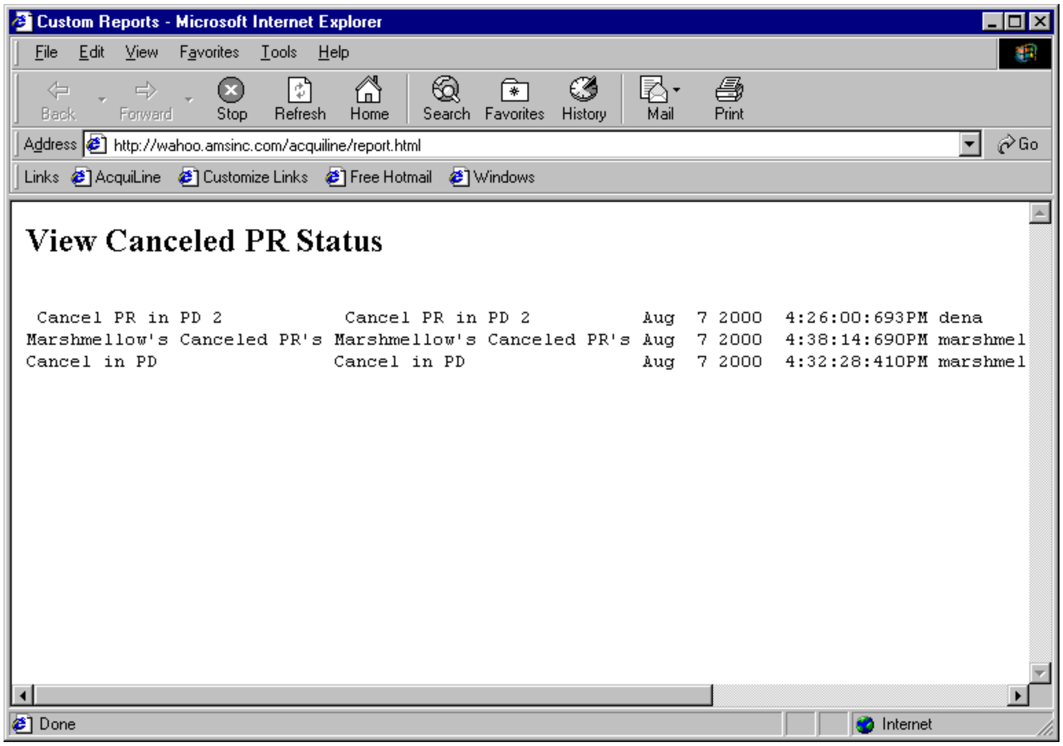

Figure 58: Custom Reports – Microsoft Internet Explorer

7. From the menu, select **File → Print** to print the report.

8. From the menu, select **File → Close**.

   This returns you to the **View Canceled PR Status Report** window in *PRweb*.

9. Click the [**Close**] button to return to the **Standard Reports** window.

10. Click the [**Close**] button to close the **Standard Reports** window and return to your desktop.

5.2.3 View Open PR Status Report

1. From the menu, select **Purchase Request → Standard Reports**.

   The **Standard Reports** window opens.

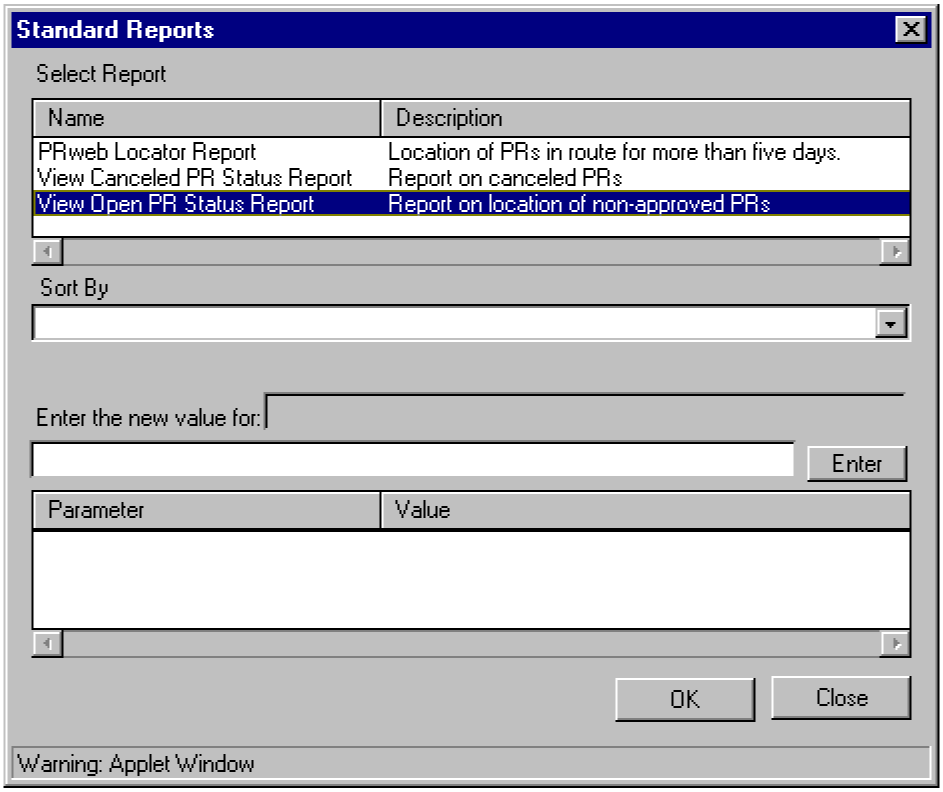

Figure 59: Standard Reports Window

2. Double-click the **View Open PR Status Report** option in the **Select Report** panel.
3. Select "*STATUS*" from the **Sort By** drop-down list box.

Note: The **Sort By** drop-down list box enables you to further define the search results (e.g., you can sort PRs and display them by PR Number or Description).

---

4. Double-click "*BEGIN_DATE*" in the **Parameter** field.

Note: The **Parameter** field enables you to further define the search results. For example, if you wanted to view PRs created on a specific day, enter that date in the **Enter the new value for** field above the **Parameter** table.

---

5. Click [**OK**] to generate the report.

   The **View Open PR Status Report** window opens.

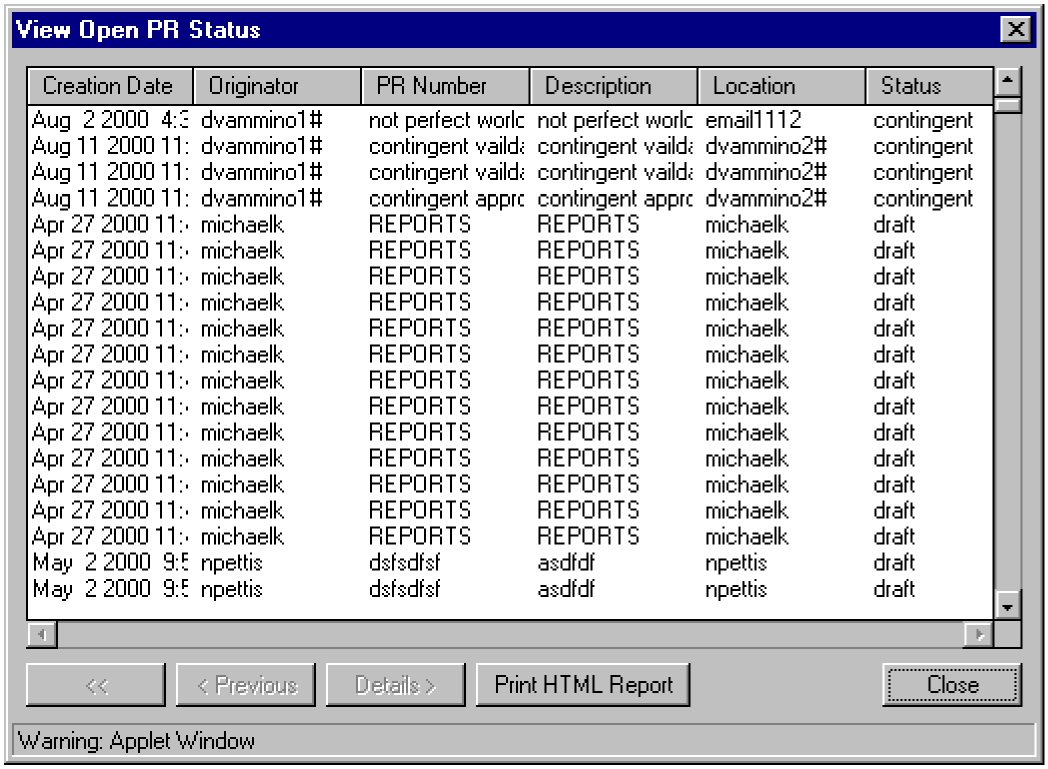

Figure 60: View Open PR Status Window

Note: You can click the [<<], [**Previous**], [**Details**], or [**Print HTML Report**] button to aid in the report generation process.

---

6. Click the [**Print HTML Report**] button.

   The report details display in the browser.

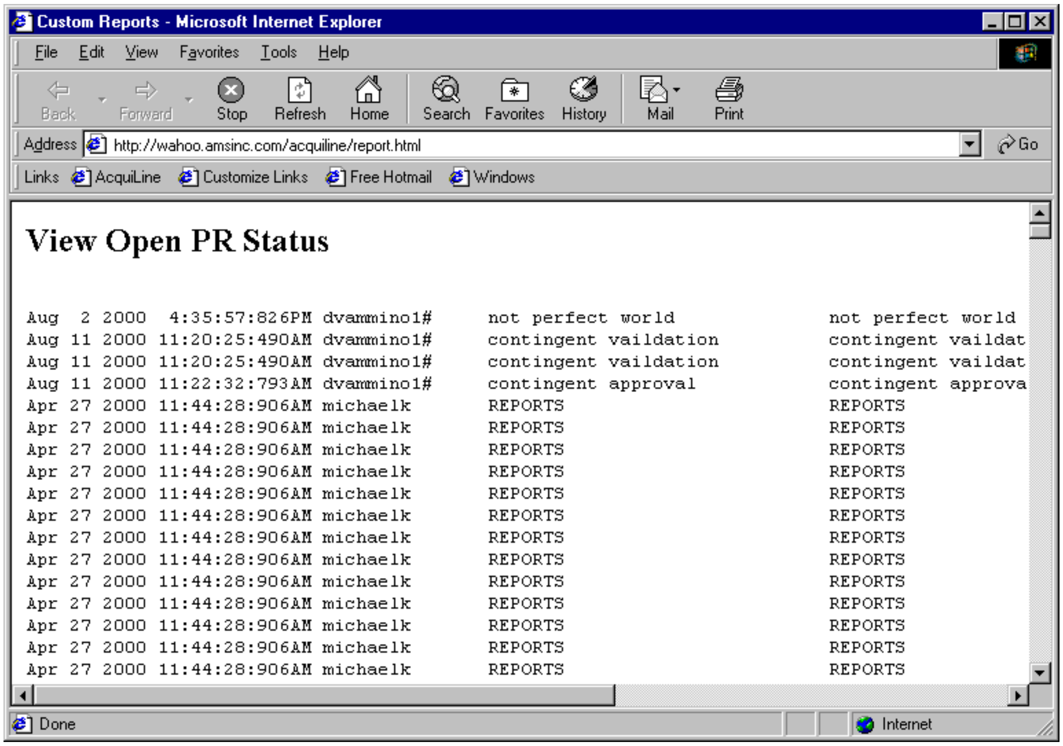

Figure 61: Custom Reports – Microsoft Internet Explorer Window

7. From the menu, select **File → Print** to print the report.
8. From the menu, select **File → Close**.

   This returns you to the **View Open PR Status Report** window in *PRweb*.
9. Click the [**Close**] button to return to the **Standard Reports** window.
10. Click the [**Close**] button to close the **Standard Reports** window and return to your desktop.

Lesson Review

During this lesson, you learned how *PRweb* supports the electronic submission or requirements documents into PD^2. You learned that *PRweb* supports the creation of PRs and Attachments, as well as the approval and submission process.

Upon completion of this lesson you should understand how *PRweb* supports the Requirements Phase of procurement, successfully created a PR and Attachment, routed the requirements, approved and submitted the requirements documents into PD^2 and generated a summary report for that requirement.

The lesson review provides questions pertaining to the key elements covered in this lesson.

1. Where does the PR reside on your desktop after the PR has been submitted into PD^2?

   a. Inbox

   b. Outbox

   c. Drafts

   d. Archive

2. What function enables you to identify the Procurement Phase and Milestone Plan for a given Requirement?

   a. Reports

   b. Procurement phase

   c. PD^2 interface

   d. None of the above

3. What kind of reporting tool(s) does *PRweb* provide?

   a. Custom Reports

   b. Standard Reports

   c. PR Status Reports

   d. B and D

Answers to Lesson Reviews

Lesson 1

1. c
2. a
3. b

Lesson 2

1. b
2. d
3. c

Lesson 3

1. b
2. a
3. b